

## 2023 QUESTIONNAIRE

While you are getting your paperwork together, please take to moment to answer the following:

Any changes in your marital status, dependents, address, phone numbers or e-mail addresses?

For direct deposit and/or direct debit, please confirm your bank information:

- 1) Bank Name:
- 2) Routing Number:
- 3) Account Number:
- 4) Type of Account:

Or, attach a "Void" check.

Please provide driver's license information - license number, state of issue, issue date, and expiration date.

- 1) Taxpayer:
- 2) Spouse:

Any crypto/virtual currency activity in 2023?

Any foreign accounts in 2023?

In addition, do you have:

Health insurance through healthcare.gov?

Unemployment compensation?

Did you buy, sell, or refinance your home? Provide closing statement.

**Any other income besides what you have received on tax forms?**

**Please bring in all your tax forms and any other tax paperwork.**

The following deductions can be used on the Arizona return in addition to the standard deduction:

Charitable contributions → List each charity, amount and attach receipt or letter from charity.

Long term care insurance premiums → List each payment and attach receipts.

529 (education savings account) plan contributions → List each beneficiary and amount contributed in 2023.