



PLEASE ANSWER ALL (even if the answer is NO) & ATTACH all PERTINENT data.

IN 2022, YOU (OR YOUR SPOUSE):

YES

NO

- Has your Marital Status Changed? \_\_\_ \_\_\_
- Did your Address Change since you filed your 2021 Return? \_\_\_ \_\_\_
- Are you being claimed as a Dependent on another person’s return? \_\_\_ \_\_\_
- Are there any changes in the Dependent Information from 2021 (school, dependency, etc) \_\_\_ \_\_\_
- Do your Dependent children have Investment Income? \_\_\_ \_\_\_
- Were You and/or your Spouse a Citizen all year? (Circle which one(s)) \_\_\_ \_\_\_
- Were you and/or your Spouse a Resident Alien All Year? (Circle which one(s)) \_\_\_ \_\_\_
- Do you have dependents who are NEITHER U.S. Citizens nor U.S. Residents? \_\_\_ \_\_\_
- Did you pay **Education Expenses** for your Dependent Children? \_\_\_ \_\_\_
- Did you pay over half of the support for a parent who lived with you or lived elsewhere? \_\_\_ \_\_\_
- Did you maintain a household & pay over 1/2 the support for someone you are not claiming as a Dependent on your Income Tax Return (eg. Due to divorce, etc) \_\_\_ \_\_\_
- Are either you (or your spouse, if filing with a spouse) an Honorably Discharged VETERAN of the Military or National Guard? If so, attach **DD214** if not already provided. \_\_\_ \_\_\_
- Have you or your spouse or your dependents been victims of Identity Theft and been given an **Identity Theft Protection Six Digit PIN** by the IRS? \_\_\_ \_\_\_
- Receive any **Income Tax Notices** from the IRS or the State? \_\_\_ \_\_\_
- Were you ever Denied or Disallowed the Earned Income Tax Credit or Child Tax Credit in a Prior Year, or were your credits reduced in a prior year? \_\_\_ \_\_\_



**FOREIGN INCOME**

- At any time during 2022, Did you (alone or with another) Hold **signature authority** or an interest in or have funds in a **foreign bank, securities,** or other **financial accts**? \_\_\_ \_\_\_
- Have **income producing** assets in a **foreign country,** sell foreign property, or pay foreign taxes? \_\_\_ \_\_\_
- Receive gifts or bequests from a **foreign entity** or from a **Foreign person**? \_\_\_ \_\_\_
- Did you receive any Foreign Income of any sort, rental property, business, etc? \_\_\_ \_\_\_



**SALES & USE TAX**

- Make an **out-of-State** purchase or online for which you owe **USE TAX,** or **other Sales Taxes**? \_\_\_ \_\_\_
- Buy a new vehicle, boat or aircraft and pay **State Sales Tax**? (give details) \_\_\_ \_\_\_

**Be sure to provide all pertinent information. Packet A on our website contains important information and explanations for many of the questions. [www.nancyfeltz.com](http://www.nancyfeltz.com)**

**INCOME**

**YES**      **NO**

- Have **Any Other Income** not included in these questions?:
  - a. Solar Power Income from Home Panels? \_\_\_\_\_
  - b. GIG Economy Income (online, freelance, platform, marketplace, apps, etc)? \_\_\_\_\_
  - c. Independent Contract work even if not reported on a tax document? \_\_\_\_\_
  - d. Unreported Tip Income? \_\_\_\_\_
  - e. Gambling Winnings, Fantasy Sports, etc.? \_\_\_\_\_
- Have Any Other Income that was NOT reported on a Tax Document? \_\_\_\_\_
- Receive Unemployment Compensation \_\_\_\_\_
- Receive Alimony (provide Date of Divorce Decree and amount)? \_\_\_\_\_
- Receive **early distribution** from IRA, 401(k), etc. (give details of use) eg, for **medical expense**)? \_\_\_\_\_
- Receive payments from a **Long-Term Care** Insurance Contract? \_\_\_\_\_
- Receive **Employer provided education assistance**? \_\_\_\_\_
- Did you **Barter** your Services for goods or services from someone else? \_\_\_\_\_
- Receive Stock from a Stock Bonus Plan with your Employer? \_\_\_\_\_
- **Sell any assets** other than stocks & bonds? \_\_\_\_\_
- **Purchase** or **sell** your Principal residence, or re-finance? Attach Closing Documents) \_\_\_\_\_
- Did you purchase or sell any other Residence or Property? (Attach Closing Documents) \_\_\_\_\_
- Is your home considered a **Historic Home**? \_\_\_\_\_
- Suffer a **Foreclosure** on a home or have **Mortgage Debt Forgiveness**, have a **Short Sale, etc?** \_\_\_\_\_
- **CRYPTO CURRENCY/VIRTUAL CURRENCY AND NFT's, etc.**

AT ANY TIME DURING 2022, DID YOU

  - (a) Receive (as a reward, award, or payment for property or services) or as a hobby; or
  - (b) Ell, Exchange, Gift, or otherwise Dispose of a Digital Asset (or a financial interest in a Digital Asset)?
- Go through **Bankruptcy** proceedings? \_\_\_\_\_
- Make a **ROTH conversion** in 2022? \_\_\_\_\_
- Make a Qualified Distribution to a **Charity** from a **ROTH** or **Traditional IRA**? \_\_\_\_\_
- Suffer a **casualty loss** of any kind or in a **FEDERAL declared disaster area**? \_\_\_\_\_
- Receive proceeds from a **lawsuit** or **class action**? \_\_\_\_\_
- Were you a victim of **investment theft** or a **Ponzi Scheme**? \_\_\_\_\_
- Have income from **installment sales**? \_\_\_\_\_
- Make a Loan at an Interest Rate below Market Rate? \_\_\_\_\_
- Did any security become worthless during 2022 or any debts become uncollectible? \_\_\_\_\_
- Did you exchange any securities or investments for something other than Cash? \_\_\_\_\_
- Receive **Hobby** Income? \_\_\_\_\_



**YES**      **NO**

- Engage in any **Farming** activities? \_\_\_\_\_
- Receive **TIP Income** which is not reported on Form W-2's? \_\_\_\_\_
- Do you do **Online Gambling**? \_\_\_\_\_
- Anticipate a **Major Change** in **Income** or **Deductions** for the coming year? \_\_\_\_\_

**DEDUCTIONS FROM INCOME**

- **Pay Expenses for the care of your Child or other qualifying person so you could work?** \_\_\_\_\_
- **Pay any Student Loan Interest?** \_\_\_\_\_
- Have **moving expenses (FOR MILITARY PERSONNEL ONLY)?** \_\_\_\_\_
- Make any contributions to a **Keogh** or a **self-employed SEP, SIMPLE** or **Qualified Plan?** \_\_\_\_\_
- Make any contributions to an **IRA, or ROTH IRA, etc** for 2022? \_\_\_\_\_
- Make contributions to a Medical Savings Account for 2022 (**HSA, Archer MSA, etc.**) \_\_\_\_\_
- Make any contributions to a Section 529 or ABLA account? \_\_\_\_\_
- Have un-reimbursed **Educator Expenses?** (Covid supplies qualify) (**\$300 for 2022**) \_\_\_\_\_
- Incur unreimbursed expenses as a **Reservist, performing artist** or **fee-based govt official?** \_\_\_\_\_
- Pay expenses to **adopt** a child in 2022 or file a Form 8839 Adoption Credit in a prior year? \_\_\_\_\_
- Pay wages to **household employees** (over age 18) of **\$2,400** or more? \_\_\_\_\_
- Buy a **new Alternative (clean ) Fuel, plug-in** or **electric motor vehicle, etc?** \_\_\_\_\_
- Perform or purchase any **SOLAR or Energy Efficient Property or HOME IMPROVEMENTS?** \_\_\_\_\_
- Purchase any special fuels for Non-Highway Use? \_\_\_\_\_
- Did you pay for Long Term Care Insurance? \_\_\_\_\_
- Pay Alimony (Provide Date of Divorce Decree and Amount)? \_\_\_\_\_

**HEALTH COVERAGE**

- Did you have **Health Insurance Coverage** at any time in **2022?** Give details and months (B4) \_\_\_\_\_
- Did you receive **Form 1095-A** for 2022 regarding health coverage? **Provide all copies . . .** \_\_\_\_\_



**OTHER**

- Make gifts of more than **\$16,000** to any individual, a trust or a Qualified Prepaid Tuition Plan? \_\_\_\_\_
- Need my Services for preparation of **Estate, Gift or Inheritance Tax Returns?** \_\_\_\_\_
- **NEW CLIENTS** – Have you sold business property in the last 5 years? Paid AMT in the past? \_\_\_\_\_

• INDICATE IF I CAN DISCUSS YOUR RETURN WITH Anyone else: NO\_\_\_\_, IF YES\_\_\_\_, PROVIDE name or names and relationship of the individual(s).  
 \_\_\_\_\_

**SIGNATURES** x \_\_\_\_\_ **x** \_\_\_\_\_ **Date** \_\_\_\_\_