1 STOP TAX SERVICES - RETURNING CLIENT QUESTIONNAIRE

SECTION 1: TAXPAYER INFORMATION

Taxpayer Last Name:	First:	Email Address:

Preferred Method of Contact: Home Phone ☐ Cell Phone ☐ Email ☐ Text ☐

SECTION 2: ADDRESS CHANGE

If your address changed in 2023, complete this Section. If not, go to Section 3.

Street Address:	Apt. #:

City:	State:	Zip Code:

Did you buy/sell a home in 2023? ☐ Y ☐ N ***(If yes, include copy of Closing Disclosure Form)***

SECTION 3: MARITAL AND FAMILY CHANGES

If you had any marital or family changes in 2023, complete this Section. If not, go to Section 4.

Select the option that best describes your marital status in 2023:	☐ Married	☐ Divorced
	☐ Separated	☐ Widow

Were there any births, deaths, or adoptions in your immediate family in 2023? ☐ Y ☐ N

Name:	Date of Birth:	Date of Death:	Social Security Number:

SECTION 4: INCOME INFORMATION

Please check off the items of income that you received in 2023

☐	Wages (include W-2)	☐	Unemployment Compensation (include 1099-G)
☐	Interest Income (include 1099-INT)	☐	Gambling Winnings (include W2-G)
☐	Dividends/ (include 1099-DIV)	☐	Independent Contractor (include 1099-NEC/MISC)
☐	Investment Sales (include 1099-B)	☐	Rental Income (include 1099-MISC or support)
☐	Social Security (include SSA-1099)	☐	Receipt or Sales of Digital Assets/ Cryptocurrency
☐	Other: _____		

SECTION 5: RETIREMENT/HEALTH CARE INFORMATION

Did you or your spouse receive payments/distributions from a retirement plan such as a pension, 401K, or IRA in 2023 or plan to in 2024? ***(If yes, attach Form 1099-R)***	☐ Y	☐ N
Did you receive an early distribution from a retirement plan to pay medical bills, for college or to purchase a home? ***(If yes, list reason: _____)***	☐ Y	☐ N
Did you purchase Health Insurance from the Marketplace? ***(Attach Form 1095-A)***	☐ Y	☐ N
Did you participate in a Health Savings Account (HSA) in 2023? ***(If yes, attach Form 1099-SA and 5498-SA)***	☐ Y	☐ N

SECTION 6: RENTERS

Did you rent during 2023? ***If yes and total household income is less than $67,300, answer the following:***	☐ Y	☐ N

Name and Address of Landlord:			
Monthly Rent Paid in 2023:		Number of Months Rented:	

SECTION 7: CHILD AND DEPENDENT CARE

Did you pay any child/dependent care expenses in 2023 for a child under 13 years old or costs to care for a handicapped individual? ***If yes, complete the following:***	☐ Y	☐ N

Name of Child Care Provider	Provider EIN/Social Security#
Provider Address	**Amount Paid to Provider**

SECTION 8: TAX DEDUCTIONS

☐	College Tuition (include 1098-T)	☐	Mortgage Interest (include 1098)
☐	Student Loan Interest (include 1098-E)	☐	Property Tax Statements
☐	Contributions to 529 Education Plan	☐	Charitable Contribution Receipts
☐	Vehicle Registration Fees _____	☐	Gambling Losses (if you had winnings)
☐	Energy Efficient Home Improvements	☐	Purchase of Electric Vehicle
☐	Unreimbursed Medical Expenses (if total amount paid is over 7.5% of your income)		
☐	Contributions to Michigan First-Time Home Buyer Savings Program in 2023		

SECTION 9: FILING INFORMATION

Did you receive a 6-digit IRS Identity Protection PIN Number? You can check to see if you were issued a PIN by visiting your **IRS Online Account.**	☐ Y	☐ N
The IRS is able to deposit refunds directly into up to (3) taxpayer's accounts. If you receive a refund, would you prefer to have your funds direct deposited?	☐ Y	☐ N

If yes, please confirm that the bank account used on your 2022 Tax Return is still valid.
If not, please enter updated account information below:

Bank Name	Routing Number	Account Number	Type of Account
			Select Type of Accou
			Select Type of Accou

ADDITIONAL INFORMATION, COMMENTS, QUESTIONS