

COVER SHEET - QUESTIONNAIR – CHECK LIST

(# pages attached: _____)

We take normal in-person tax appointments. In certain cases, we can help to prepare tax ONLINE for the returning clients who can email or text me information (if simple) in ONE COMPLETE EMAIL. Then we can prepare and e-file your tax copy for your review and signatures of approval. You can pay for our service fee by check, VENMO, PAYPAL, ZELLE, CASH, APPLE PAY apps.

To help us to prepare your tax accurately and completely, please fill out this questionnaire, email or bring with you and your tax information to the appointment. If you have many questions, please call for an appointment.

SON LE

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TAX YEAR 2023

YOUR NAME _____ Email: _____ Cell # _____

Any change from last year: (PLEASE CIRCLE)

Fill-in new information below

- | | | |
|----------------------|----------|-------|
| 1. New Address ? | YES / NO | _____ |
| 2. Filing Status? | YES / NO | _____ |
| 3. Dependents? | YES / NO | _____ |
| 4. Bank /Account # ? | YES / NO | _____ |

How many W2s you have ? # _____

How many income Forms 1099-NEC, 1099-MISC or 1099-K do you have ? _____

Do you have any other taxable incomes WINNING, SALES OF STOCKS, CANCELED DEBT? YES / NO

Did you have third-party settlement business transactions such as PayPal, Venmo, CASH YES / NO

Do you have any month of health insurance under Covered-California (**Form 1095-A**) YES / NO

Do you or your dependents have any college tuition statements (**Form 1098-T**) YES / NO

Do you pay for childcare? Provider's tax ID and amount _____ YES / NO

Do you have business or rental income? Email or Go to my website for organizing worksheets YES / NO

ANY TAXABLE EVENTS like Solar installation, EV purchase sales of properties? or SPECIAL NOTES:

Seventy five percent of taxpayers use STANDARD DEDUCTION. If you think you have tax benefit by ITEMIZED DEDUCTIONS, please provide the amount paid in 2023 :

PROPERTY TAX: \$ _____, MORTGAGE INTEREST:\$ _____, DMV FEES: \$ _____

DONATION: \$ _____ OTHERS _____

PLEASE TEXT ME AFTER YOU EMAIL ANY DOCUMENT SO WE CAN CONFIRM

Cell (510)290-7043 , hisonle@yahoo.com or hisonle@gmail.com

You can also call or text # (510)240-2215 to set in-office appointment