**INTERVIEW QUESTIONNAIRE 2022**

*If I were meeting with you in person, the information below is what I would be asking you about. Please take the time to supply the needed information. If you have questions, give me a phone call.*

|  |  |
| --- | --- |
| Taxpayer name | Spouse name |
| Taxpayer phone | Spouse phone |
| Taxpayer email | Spouse email |

If you have **Obamacare** for health insurance, I must have the form 1095A which the insurance company will mail you in January.

|  |  |  |  |
| --- | --- | --- | --- |
| Question | Yes | No | If No, provide the new informaton |
| Are your **dependents** the same as last year? |  |  |  |
| Is your **address** the same as last year? |  |  |  |
| Is your **bank info** for direct deposit of your refund the same as last year? |  |  |  |

These are possible tax saving items you might have. If any of them apply, write in the amount:

|  |  |
| --- | --- |
| **Child care expenses** in order to work (I will need the name, address, social security number, and amount paid of each provider) | $ |
| **Health insurance premiums** (If the premiums are deducted from your paycheck, they are pre-tax and don’t count. What does count are premiums you pay for out of your own pocket such as medicare supplement premiums. Don’t include your medicare premium, because I will get it from your social security statement 1098-SSA you are sending me. | $ |
| **Education credit** for college tuition (I must have the form 1098T from the school. I also need the amount spent on books.) | $ |
| **HSA contribution** | $ |
| **HSA withdrawals** (form 1099SA) | $ |
| **IRA contribution** | $ |
| **Energy saving home improvements** (describe) | $ |
| **Donations to school, library, or youth ranch** (Idaho residents only) | $ |
| **Student loan interest** | $ |

My website (thomastaxpreston.com) has additional forms you can use to give me your information if you have a farm, business, rental, or itemize deductions (charitable donations, house interest, etc.).

Many of you are going to see smaller refunds this year. Last year (2021) a lot of refunds were unusually high due to higher child credits and more generous earned income credit rules in an effort to put more money into the hands of taxpayers due to poor economic conditions during the pandemic. Those provisions were only for that year. We are now back to normal.