

## INTERVIEW QUESTIONNAIRE 2023

Please take the time to supply the needed information below. If you are meeting with me in person, bring this sheet with you. If you are sending me your information (either regular mail or email) include this form. 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 <b>dependents</b> the same as last year?			
Is your <b>address</b> the same as last year?			
Is your <b>bank info</b> 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:

<b>Energy savings credits</b> (these are much more generous this year)	Solar panels \$ _____	Water heater \$ _____	Windows \$ _____
	Air Conditioner \$ _____	Heat pump \$ _____	Exterior doors \$ _____
	Furnace \$ _____	Biomass stove \$ _____	Insulation \$ _____
<b>Electric vehicle</b>			
<b>Child care expenses</b> in order to work (I will need the name, address, social security number, and amount paid for each provider.)			\$ _____
<b>Health insurance premiums</b> (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 <u>supplement</u> premiums. Don't include your medicare premium, because I will get it from your social security statement 1098-SSA you are sending me.)			\$ _____
<b>Education credit</b> for college tuition (I must have the form 1098T from the school. I also need the amount spent on books.)			\$ _____
<b>HSA contribution</b>			\$ _____
<b>HSA withdrawals</b> (form 1099SA)			\$ _____
<b>IRA contribution</b>			\$ _____
<b>Donations to school, library, or youth ranch</b> (Idaho residents only)			\$ _____
<b>Student loan interest</b>			\$ _____

My website ([thomastaxpreston.com](http://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.).