

Name \_\_\_\_\_

**AQ23**

## Mandatory organizer questions – please answer all every year

These questions must be answered on your tax return

Yes No

### Foreign Accounts

- |  |                          |                          |
|--|--------------------------|--------------------------|
| 1. Do you have a foreign bank account?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Do you have funds of any financial kind in a foreign country over \$10,000?                           | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Do you have assets of any kind in a foreign country over \$50,000 (single)/\$100,000 (married joint)? | <input type="checkbox"/> | <input type="checkbox"/> |

### Sales Tax

- |  |                          |                          |
|--|--------------------------|--------------------------|
| 4. Did you purchase anything online, by catalog, from T.V. on which you did NOT pay sales tax? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. If so, what was the total amount of such purchases? _____                                   |                          |                          |
| 6. What was your COUNTY tax rate of residence in 2023? _____                                   |                          |                          |

- |  |                          |                          |
|--|--------------------------|--------------------------|
| 7. Did you have total coverage health insurance in 2023?       | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, please bring form 1095 from your insurer when received |                          |                          |

### Rental you own

- |   |                          |                          |
|---|--------------------------|--------------------------|
| 8. Did you make any payments over \$600 for services that requires you to file form 1099?<br>(gardener, handyman, etc.) | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Did you or will you file the <u>required</u> forms 1099 and 1096?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. Days rented at fair rental value (for each rental) _____  |                          |                          |
| 11. Days of personal use _____  |                          |                          |

### Business you own

- |  |                          |                          |
|--|--------------------------|--------------------------|
| 12. Did you make any payments over \$600 for services that requires you to file form 1099? | <input type="checkbox"/> | <input type="checkbox"/> |
| 13. Did you or will you file the required forms 1099 and 1096?                             | <input type="checkbox"/> | <input type="checkbox"/> |
| 14. Did you sell any bitcoins or any virtual currency, not included on a form 1099?        | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, we need your cost basis, sales price and dates bought and sold                     |                          |                          |

**NOTE** If you mail us your tax information please include this page and questionnaire from the organizer.