

JEFF PINKNEY CPA, INC.
CERTIFIED PUBLIC ACCOUNTANT

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CLIENT CHECK IN WORKSHEET - Tax Year 2023

Name: _____

Check in date: _____

Address: No Change / Same as prior year ()

New: _____

Phone: _____

Email: _____

Occupation: _____

If a refund is due, do you want it direct deposited? Yes () No ()

Is your bank account the same as last year? Yes () No ()

Financial Institution Name: _____
Routing #: _____
Account #: _____
Checking () Savings ()

**If a balance due, do you want the payments Yes () No ()
drafted from your account ? (Amounts will be set to come out April 15th)**

Dependency Changes: No Change - Same as prior year ()

New dependent ()

Name: _____

DOB: _____

SSN: _____

Relationship: _____

Missing Items or Notes:

Name _____

Tax Year _____

Yes

No

- 1) Would you like to contribute to an IRA for the 2023 year? We can calculate the maximum amount you are able to contribute once we work up the tax return. Please let us know if you will be contributing to a Traditional IRA or a Roth IRA by April 15th. _____
- 2) Do you expect your 2024 taxable income and withholdings to be different from 2023? (This is mainly for self-employed individual & people that pay estimated tax payments/vouchers) _____
- 3) Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources? If yes provide receipts/documentation. _____
- 4) Did you purchase an electric or plug-in hybrid vehicle eligible for Federal Tax Credits? This mainly is applicable for new vehicles (stipulations apply to used vehicles) (For more info visit: <https://fueleconomy.gov/feg/taxevb.shtml>) _____
- 5) Did you have any transactions pertaining to a health savings account (HSA) or medical savings account (MSA)? If so, include all 1099-SA and/or 5498-SA forms. If you had any distributions, were they used for qualifying medical expenses? _____
- 6) Are you enrolled in Marketplace Health Insurance? If so, please include the 1095-A in order to reconcile your advance premium tax credits. _____
- 7) Did you contribute to a College Savings/529 Plan? (Please enclosed amount of contributions and any applicable paperwork/statements) _____
- 8) Do you or any of your dependents pay tuition to a secondary educational institution? If so, include Form 1098-T. Also include the cost of books/supplies required for the related tuition. _____
- 9) Did you pay any student loan interest? If so, include form 1098-E. _____
- 10) Are you or your spouse an educator that spent \$300 or more of personal money on materials or supplies for your classroom? _____
- 11) Did you have any interest in or a signature authority over a bank account, securities account, or other financial account in a foreign country? _____
- 12) At any time during the year, did you or your spouse receive, sell, send, exchange, or otherwise acquire any financial interest in any cypto or virtual currency? _____

Tax Form Reference Guide Please send us all tax forms you receive. We will scan and return all your documents to you.

Income/Deduction	Tax Form
Wages	W-2
Interest, Dividends, Sale of Stocks, Securities, Capital Assets	1099-INT / DIV / B
Miscellaneous Income	1099-MISC or 1099-NEC
Retirement/IRA/Pension Distributions	1099-R
Social Security Income	SSA-1099
Unemployment Compensation	1099-G
Pass-thru Income (LLC's, S Corps, Partnerships, Trusts, Estates)	Schedule K-1
Mortgage Interest	1098
Health Savings Account	1099-SA or 5498-SA
Marketplace Health Insurance Coverage	1095-A
Student Loan Interest	1098-E
Tuition	1098-T