

CYNTAX, LLC

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2023 INCOME TAX INFORMATION

Taxpayer's Full Name _____ Spouse's Full Name _____
Soc. Sec. No. _____ Date of Birth _____ Soc. Sec. No. _____ Date of Birth _____
Occupation _____ Driver's License No. _____ Occupation _____ Driver's License No. _____
Driver's License Issue Date: _____ Expiration Date: _____ Driver's License Issue Date: _____ Expiration Date: _____
Home Address _____
Home Phone _____ Cell Phone _____ Cell Phone (Spouse) _____
Email address _____ Email address (Spouse) _____

DEPENDENTS

Full Name	Social Security Number*	Date of Birth	Relationship

*Please bring Social Security cards for verification if we do not have a copy.

IMPORTANT ITEMS TO BRING

W-2s from all employers
Social Security Benefits Statement (SSA-1099)
Unemployment Compensation (1099-G)
Form 1095 A – Marketplace Insurance statement
Forms 1099: 1099-NEC; 1099-MISC (Miscellaneous Income); 1099-INT (Interest);
1099-DIV (Dividends); 1099-B (Sale of stocks/securities);
1099-R (Pensions & Annuities/Retirement Plan Withdrawals);
1099-C or 1099-A (Debt Forgiveness); 1099-K (Credit card/3rd party payments)
1099 / W2 for Jury Duty or Poll Worker Income
Form K-1 from Estates/Trusts, Partnerships or S Corporations
Form W-2G for Gambling Winnings

Mortgage Interest Statement(s) + settlement statement(s) for
any home you bought, sold or refinanced in 2023.
Real estate/property taxes paid
Car Tag Receipts & Proof of charitable contributions
Education expenses: 1098-T from college; Billing stmt. from college;
Receipts for tuition payments & books; 1099-Q from 529 Plans
Student loan interest information (Form 1099-E)
Stock or property sold? Bring historical cost basis (Form 1099-B)
Purchase date/price/cost basis for any stock declared worthless
Medical Savings Account/Health Savings Account info
Transactions & holdings involving Cryptocurrency

If you are a new client, please bring a copy of last year's tax return.

QUICK QUESTIONNAIRE

During 2023, did you:

- _____ Receive an Identity Protection PIN from the IRS due to identity theft? If so, bring IRS letter (CP01A Notice).
- _____ Have a change in number of dependents? Were there any births, deaths, marriages, divorces or adoptions in your immediate family?
- _____ Purchased health insurance online through the Marketplace? (Bring Form 1095-A)
- _____ Receive Social Security benefits or Unemployment Compensation? (Bring SSA-1099 for Social Security; 1099-G for Unemployment)
- _____ Make any estimated tax payments? Please provide payment details on the next page.
- _____ Transfer, rollover or withdraw any 401(k) or IRA accounts? If so, bring 1099-R.
- _____ Contribute (or do you plan to contribute) to an IRA, SEP or Roth IRA?
- _____ Did you make a qualified charitable donation directly from your Required Minimum Distribution (RMD)?
- _____ Make charitable contributions by check or cash? Need receipts.
- _____ Incur any education expenses for yourself, your spouse, or dependent? Receive education benefits through a prepaid tuition program (PACT or Alabama 529 Plan)? Pay student loan interest? Bring Form 1098-E; Contribute to the Alabama College Counts 529 Plan? Bring Bursar Account Statement, Book Receipts, Forms 1098-T & 1099-Q.
- _____ Pay for child/dependent care? If so, we need the name, address, Social Security number/EIN of your childcare provider, plus the total amount you paid during 2023. Did you receive any employer-provided dependent care assistance benefits? Use Flex Plan benefits for daycare expenses?
- _____ Have unreimbursed work-related expenses? (Union dues, professional association dues, continuing education uniforms, job search, etc.)
- _____ Receive any income from a pension, profit-sharing, 401(k), Retirement, Keogh, IRA, Roth, or tax-sheltered annuity plan? (Bring 1099-R)
- _____ Have any out-of-pocket expenses incurred as a volunteer? (This includes mileage, uniforms, and supplies).
- _____ Pay (or receive) alimony? (If you paid alimony, please provide the date of divorce, along with the name, SSN, and address of the person receiving payments).
- _____ Purchase a new home? Sell or refinance an existing home? Please provide a copy of the settlement statement(s).
- _____ Sell or cash in stocks, bonds, U.S. savings bonds, or property? If so, bring form 1099-B. Any stocks declared worthless? Need cost basis and date purchased.
- _____ Buy, sell or hold any cryptocurrency?
- _____ Start a business? Purchase (or sell) rental property?
- _____ Have income (or loss) on K-1 from any Partnership, LLC, S Corp, Estate or Trust? (Bring K-1)
- _____ Have foreign income or pay foreign taxes? Have foreign investment/bank accounts valued at over \$10,000 at any time during 2023? File your FBAR?
- _____ Make any internet purchases from out-of-state retailers on which no sales tax was paid? Need total dollar amount of those purchases.
- _____ Make any residential energy efficiency improvements? HVAC Unit, windows, insulation Solar hot water heaters or fuel cells.
- _____ Buy an electric vehicle or have an electric charging station installed

2023 ESTIMATED TAX PAYMENTS**FEDERAL ESTIMATED TAXES PAID**

Date Due	Amount Paid	Date Sent	Date Due	Amount Paid	Date Sent
April 17, 2023			April 17, 2023		
June 15, 2023			June 15, 2023		
Sept. 15, 2023			Sept. 15, 2023		
Jan. 15, 2024			Jan. 15, 2024		

STATE ESTIMATED TAXES PAID**SCHEDULE A – ITEMIZED DEDUCTIONS****UNREIMBURSED MEDICAL EXPENSES**

Prescription Drugs. \$ _____
 Medical Insurance Premiums. \$ _____
 Long-Term Care Ins. Premiums. \$ _____
 Medicare Premiums. \$ _____
 Doctors \$ _____
 Dentists \$ _____
 Clinic/Lab Tests. \$ _____
 Eyeglasses/Contact Lenses & Solutions. \$ _____
 Hearing Aids/Batteries. \$ _____
 Orthopedic Shoes/Brace \$ _____
 Medical Lodging. \$ _____
 Miles for Medical Treatment:
 _____ miles @ .22 per mile Jan – Dec. \$ _____

INTEREST EXPENSE

Home Mortgage Interest Paid to
 Financial Institutions. \$ _____
 Home Equity Interest. \$ _____
 Home Mortgage Interest Paid to Individual. \$ _____
 Name/Address _____

 Social Security No. _____
 Deductible Points Paid. \$ _____
 Investment or Margin Interest paid. \$ _____

TAXES PAID

Real Estate Taxes. \$ _____
 Personal Property Taxes. \$ _____
 State/Local Income Taxes. \$ _____
 Sales Tax paid on Car/Boat/RV. \$ _____
 Car Tag (Ad Valorem Tax). \$ _____

CHARITABLE CONTRIBUTIONS

Cash/Check Contributions. \$ _____

 Non-Cash Contributions. \$ _____

 Were any charitable contributions part of your IRA RMD? _____
 Miles for Charity:
 _____ miles @ .14 per mile. \$ _____

MISCELLANEOUS DEDUCTIONS

Unreimbursed Business Expenses. \$ _____
 Union/Professional Dues. \$ _____
 Safe Deposit Box. \$ _____
 Tax Return Preparation Fee. \$ _____
 Business Publications/Continuing Education \$ _____
 Business Phone Calls/Cell Phone Usage. \$ _____
 Tools, Supplies, Equipment. \$ _____
 Job Search Expenses. \$ _____
 Gambling Losses. \$ _____
 Investment Advisor Fees \$ _____

SCHEDULE C – BUSINESS INCOME

Business Name _____ **ID Number** _____

Gross Income:

Gross Income. \$ _____
Less: Returns & Allowances. \$ _____

Cost of Sales:

Beginning Inventory. \$ _____
Purchases. \$ _____
Cost of Labor. \$ _____
Materials & Supplies \$ _____
Freight In \$ _____
Other _____ \$ _____
Ending Inventory. \$ _____

Deductions/Expenses:

Advertising. \$ _____
Car & Truck Expenses. \$ _____
Business Miles:
_____ miles @65.5 per mile Jan-Dec. \$ _____
Bank Fees. \$ _____
Collection Expenses/Credit Card Fees \$ _____
Contract Labor- Did you issue 1099-NEC? \$ _____
Employee Benefit Plan. \$ _____
Insurance. \$ _____

Deductions/Expenses (continued)

Interest (Mortgage). \$ _____
Interest (Other). \$ _____
Janitorial/Cleaning. \$ _____
Legal/Accounting Fees. \$ _____
Meals Prepared by Restaurants (Business-Related) \$ _____
Office Expenses. \$ _____
Postage. \$ _____
Professional Development \$ _____
Professional Dues/Subscriptions. \$ _____
Rent or Lease. \$ _____
Repairs/Maintenance \$ _____
Salaries/Wages \$ _____
Supplies \$ _____
Taxes & Licenses. \$ _____
Telephone \$ _____
Travel (Hotel/Airfare) \$ _____
Utilities \$ _____
Misc/Other (Please describe) \$ _____

Home Office (100% Business Use):

House Sq. Ft. _____ Office Area Sq. Ft. _____

MAJOR PURCHASES – SCHEDULE C

DESCRIPTION	DATE PURCHASED	COST	TRADE-IN (IF ANY)

SCHEDULE E – RENTAL PROPERTY/ROYALTIES

Property Description: _____

Gross Rental Income: \$ _____

Number of days rented in 2022: _____

Number of days used personally: _____

Expenses:

Advertising. \$ _____

Other Interest \$ _____

Auto/Travel Expense. \$ _____

Professional Fees \$ _____

Repairs. \$ _____

Mileage:

_____ miles @ .65.5 per mile Jan – Dec. _____

Supplies. \$ _____

Cleaning/Maintenance \$ _____

Taxes \$ _____

Commissions. \$ _____

Utilities \$ _____

Insurance \$ _____

Misc./Other (Please Describe) \$ _____

Management Fees \$ _____

Mortgage Interest. \$ _____

MAJOR PURCHASES – SCHEDULE E

DESCRIPTION	DATE PURCHASED	COST	TRADE-IN (IF ANY)