

**2023****1040****US****Miscellaneous Questions**

Yes    No

**PERSONAL INFORMATION**

- Did your marital status change during the year?
- Did your address change during the year?
- Could you be claimed as a dependent on another person's tax return for 2023?
- Were either you or your spouse legally blind?
- Was your health insurance obtained through a state-sponsored marketplace? If so, you should have received a Form 1095-A (Health Insurance Marketplace Statement). Please include form 1095-A with your tax documents.

**DEPENDENTS**

- Were there any changes in dependents?
- Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2023?
- Did you have any children under age 19 or full-time students under age 24 at the end of 2023, with interest and dividend income in excess of \$1,250, or total investment income in excess of \$2,500?

**INCOME**

- Did you receive any unemployment income?
- Did you receive any disability income?
- Did you receive unreported tip income of \$20 or more in any month?
- Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?

**PURCHASES, SALES AND DEBT**

- Did you start a business; sell or acquire rental or royalty property; or sell or acquire an interest in a partnership, S corporation, trust, or REMIC?
- Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?

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Did you sell any stocks, bonds or other investment property in 2023? Please attach a statement of cost basis, dates of purchase, shares acquired, shares sold, date of sale, and sales price for items sold.

If you sold any stocks, bonds or other investment property at a loss, did you buy back the identical security sold within 30 days before or after the sale?

Did you sell any company stock that was acquired directly from a current or former employer through stock options, an employee stock purchase plan, or any other circumstances where the cost to purchase the stock was at less than fair value? If so, please include information regarding any amounts related to the stock sold that may have already been included as income on your W-2.

At any time during 2023, did you: receive, sell, send, earn, exchange or otherwise acquire or dispose of any financial interest in cryptocurrency or other digital asset?

Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? If so, please include a copy of the closing statement.

Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?

Did you have any debts cancelled or forgiven?

Does anyone owe you money which has become uncollectible?

**RETIREMENT PLANS**

Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

Did you transfer or rollover any amount from one retirement plan to another retirement plan?

Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2023?

Did you make any qualified charitable distributions from an IRA (only allowed for taxpayers over the age of 70 1/2)?

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## EDUCATION

- Did you or your spouse have any educator (Teacher of K-12) expenses? If so, please provide separate totals. You \$ \_\_\_\_\_ Spouse \$ \_\_\_\_\_.
- Did you or your dependent receive a distribution from an Education Savings Account or a Qualified Tuition Program?
- Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? If yes, please include Form 1098-T, and inform us whether the student had a felony drug conviction that would preclude them from receiving the American Opportunity Credit.

## ITEMIZED DEDUCTIONS

- Do you have proper substantiation for ALL of the cash, check, credit card and physical (e.g. used clothing) contributions? Substantiation is defined as follows: For donations less than \$250, substantiation can be a bank record, e.g. a canceled check, or written communication from the charity. For donations of \$250 or more, substantiation consists of a written acknowledgement from the charity with the organization's name, address, date and location of donation, and dollar amount of the donation. Acknowledgements of non-cash donations must also include a reasonably detailed description of the property. (Note: please keep your contribution substantiation.)
- Does the social security number of another appear on Form 1098 (mortgage interest statement) for any mortgage interest you intend to deduct during 2023?
- If you donated used clothing and/or household items, were they in "good used condition or better"?
- If you have a mortgage on personal residence or second home, was any portion of its original proceeds used for purposes other than purchasing or substantially improving the property?
- For individuals who itemize with little or no state income tax, did you make any large purchases, such as motor vehicles or boats during 2023?

## MISCELLANEOUS

- Do you \_\_\_ or your spouse \_\_\_ want to allocate \$3 to the Presidential Election Campaign Fund?
- Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account? If yes, you may be required to file Form 114 Report of Foreign Bank and Financial Accounts. **Failure to file can result in significant penalties.**

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- | Yes                      | No                       |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Was your home rented out or used in your self-employed business?   |
| <input type="checkbox"/> | <input type="checkbox"/> | If you have business car expenses, do you have a mileage log documenting the trips? If yes, please specify which vehicle _____ and total miles _____ and business miles driven _____. (W-2 employees can no longer take deductions for unreimbursed expenses. Also, a deduction for business use of your vehicle <b>cannot</b> be taken without keeping proper documentation.) |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you (or someone on your behalf, including your employer) make contributions to a health savings account (HSA) this year? Or, did you receive an HSA distribution or acquire an interest in an HSA due to the death of the account beneficiary?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have a medical savings account (MSA), a Medicare + Choice MSA, or acquire an interest in an MSA or a Medicare + Choice MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?                      |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you a member of the Armed Forces of the United States on active duty who moved pursuant to a military order related to a permanent change of station?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay or receive alimony? If so, what was the date of the original divorce or separation agreement?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse pay for childcare while you worked, looked for work, or attended school full time?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you adopt a child or begin adoption proceedings during 2023?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you engage in any bartering transactions?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur a loss because of damaged or stolen property in a federally declared disaster area for 2023?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you notified or audited by either the Internal Revenue Service or the State taxing agency?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse make any gifts to an individual that total more than \$17,000, or any gifts to a trust?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you been an identity theft victim and have you contacted the IRS? If yes, please provide the 6-digit identity protection PIN notice issued by the IRS.  |

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**MASSACHUSETTS RESIDENTS (IF APPLICABLE)**

- Did you make charitable donations in 2023? **NEW FOR MASSACHUSETTS:** Contributions to charitable organizations may be deductible on Massachusetts taxes even if you are not itemizing your deductions on your Federal taxes. Please enter your contributions in the ITEMIZED DEDUCTIONS section of the organizer. (As always, you are responsible for keeping substantiation of your donations.)
- Did you or your spouse have a FastLane account or purchase weekly or monthly transit passes for MBTA transit or commuter rail? If Yes, please provide the total for the year. You \$\_\_\_\_\_ Spouse \$\_\_\_\_\_.
- Did you contribute to a Massachusetts-sponsored 529 plan?
- Did you incur repair or replacement costs to comply with the sewer system requirements of Title V for your principal residence in 2023?
- Did you rent a principal residence at any time during 2023? If so, please provide the name and address of the landlord \_\_\_\_\_,  
dates rented \_\_\_\_\_, and the total you paid for rent in 2023 \_\_\_\_\_.
- Were you and your spouse covered by health insurance at any time during 2023? If yes, please provide a 1099-HC. A 1099-HC is not required for tax payers covered by Medicare.
- Were you or your spouse over age 65 at the end of the year? If yes, please include the amount you paid for water and sewer during the year. If your income is low enough, you may qualify for the Massachusetts circuit breaker credit.
- Did you make any purchases in 2023 subject to Massachusetts use tax, i.e. taxable items purchased in other states without paying Massachusetts sales tax? If so, specify the amount of such purchases \_\_\_\_\_ and sales/use taxes paid to other states or jurisdictions on the same purchases \_\_\_\_\_.