

Questionnaire 2022

Please check the appropriate box and include all necessary details
When in doubt, please check the "Not Sure" box so that we can discuss the issue with you.

Name: _____ Spouse's Name _____

Contact Information

E-mail address(es): _____ or I don't use e-mail

Phone Numbers (just enter the one(s) you would like us to use)

Home number: _____ Work or Cell number: _____ Other _____

How do you prefer to be contacted? E-mail Phone—circle best number.

Please check this box if something has changed and you expect to owe tax this year

Personal Information

Did you marry, divorce, separate or become widowed during the year? Yes No Not Sure

Did your address change since last year? Yes No Not Sure

New Address: _____ Date Moved: _____

Do you live with parents, relatives or friends or depend on them to pay your bills? Yes No Not Sure

Do you want to **change** the bank account where any refund gets **directly deposited**? Yes No

If yes, **please attach a voided check (not deposit slip.)** The IRS is **strongly discouraging** taxpayers from paying any estimated payments or tax due by mailed check. If you owe taxes or pay estimates, choose one

- | | |
|--|--|
| If left blank we will assume you will pay on line. | <input type="checkbox"/> paying by scheduled direct debit* (we enter your bank info but you verify it) |
| | <input type="checkbox"/> paying on line (we won't give you vouchers to mail with a check) |
| | <input type="checkbox"/> mailing a check (still available but should be avoided) |

*If you owe and may be subject to penalty, paying by direct debit cuts your penalty from 5% to 2.5%

How do you want your copy of your return? Paper copy, or PDF uploaded to our secure portal

There will be a \$15 fee for postage and handling if we need to mail your packet. I will pick up Please Mail

Purchases, Sales and Debt Information

Did you start a **new business** or buy **rental property** or form an LLC during the year? Yes No Not Sure

Did you **sell, exchange, or purchase any real estate** during the year? Yes No Not Sure

Did you **buy or sell stock** during the year? (We need the 1099) Yes No Not Sure

Did you **sell a business, rental, or other property** this year? Yes No Not Sure

Did you have any debts canceled, such as credit cards or car loans? Yes No Not Sure

Did you pay any **student loan** interest this year? Please give us the 1098-E Yes No Not Sure

Did you **lend \$10,000 or more** to anyone or lend any amount for a mortgage? Yes No Not Sure

Other Income Information

Do you receive or pay Alimony? Received \$ _____ Paid \$ _____ Yes No Not Sure

To or from who: _____

If yes, check here **if we already have** a copy of your divorce order or **please get us a copy.**

Do you have any income from hobbies or odd jobs? Yes No Not Sure

Please check "Yes" or "Not Sure" if you sell produce or farm products (and you are not a farmer), sell items through home parties, get paid to teach classes, monitor tests, sell items online, or sell craft items. ALL INCOME GREATER THAN 49¢ (it gets rounded up to \$1) MUST BE REPORTED.

Describe briefly: _____

Did you win any **prizes (not just money)** from bingo, raffles, gambling or fantasy sports?

Yes No Not Sure If yes or not sure, describe _____

- Did you withdraw or receive any money from any **retirement** account? Yes No Not Sure
 - Did you withdraw money from an **education savings** (529) plan? We need 1099Q Yes No Not Sure
 - Did you receive an **inheritance** recently or do you expect one this year? Yes No Not Sure
 - Did you receive **tip income not reported to your employer**? Yes No Not Sure
 - Did you cash in any life insurance policies or U. S. Savings Bonds? Yes No Not Sure
 - Do you own a second residence or any other real estate? Yes No Not Sure
 - Do you rent out a room, home or RV short-term such as through Airbnb? Yes No Not Sure
 - Did or do you own any cryptocurrency (like Bitcoin) or receive any as a gift or award? Yes No Not Sure
- "Cryptocurrency" includes "non-fungible tokens" "NFTs" such as digital trading cards.

Medical Insurance

If your Medical insurance was through Vermont Health Connect or the Healthcare Exchange (Obamacare) **please check here** **and make sure you bring us your form 1095A** which lists your premiums paid and any assistance you got. If you are SURE you received no premium assistance, check here

Forgetting to report premium assistance is the most common reason refunds are held up.

Miscellaneous Information

- Did you **make gifts** of more than \$16,000 to any individual? Yes No Not Sure
 - Did you change the deed on your home to give a share to anyone else (your children)? Yes No Not Sure
 - Did you make any contributions to the Vermont (VHEIP) education savings plan (529)? Yes No Not Sure
 - Did you retire, **start drawing social security** or change jobs in 2022? Yes No Not Sure
 - Do you **plan to retire** or start drawing social security in the current year? Yes No Not Sure
 - Did you purchase any solar energy panels or a geothermal pump in 2022? Yes No Not Sure
 - (If yes, please give us a copy of the receipt or tell us the total cost)
 - Did you install new windows, doors or skylights in your home? Yes No Not Sure
 - Did you buy a **new plug-in** car or 2 wheeled vehicle? Yes No Not Sure
 - Did you lose property in a federally declared disaster area during the year? Yes No Not Sure
 - Did you get any unexpected letter from a state tax department or the IRS? Yes No Not Sure
- If yes, please give us a copy or explain: _____

Foreign Account & Asset Reporting

If you have ever worked or lived outside the US, or have family who lives abroad, please answer these questions so we can help you avoid ACCIDENTALLY violating the complex reporting requirements. The penalties are VERY HIGH starting at around \$10,000. You don't have to have ANY FOREIGN INCOME to get these penalties.

Have you ever lived in, worked in, were born in, or have any connection with any **foreign countries** (including Canada)? Connections may include bank accounts, pensions, real estate owned, relatives or close friends living abroad. Do you work somewhere (such as World Learning) and have signatory authority over accounts in another country? Yes No Not Sure

***If "No" initial here: _____ and skip the Foreign Interest Worksheet on last page.

If you answered "Yes" or "Not Sure" please complete the Foreign Interest Worksheet.

New Hampshire Residents: (Vermont and other residents skip to the next page)

Did you live in and worked from NH when you usually work in VT or MA or another state?

Total number of days you worked in the year: _____ (5 days a week all year with 2 weeks Vacation would be 250 days.)

Days worked in the non-NH state: _____ Days worked in NH: _____



Signature _____ **Date** _____

New Hampshire residents only.





Vermont Residents Only

Did everyone in your household have medical insurance for all of 2022? Yes No Not Sure

Use Tax:

Use tax is due on items you purchase without paying sale tax and then USE in Vermont. There is a good video explaining this here: <https://tax.vermont.gov/individuals/income-tax-returns/use-tax> This includes items purchased in NH or online or from a catalogue where the seller doesn't collect sales tax. **If you shop at Walmart in Hinsdale or Target in Keene for anything other than clothes, prescriptions and food, you owe use tax.** Amazon is now collecting sales tax from Vermont customers but not all of their vendors do. Here are your choices:

Adjusted Gross Inc	Tax	
Up to	\$20,000	\$0
\$20,001	\$30,000	\$10
\$30,001	\$40,000	\$15
\$40,001	\$50,000	\$20
\$50,001	\$60,000	\$25
\$60,001	\$70,000	\$30
\$70,001	\$80,000	\$35
\$80,001	\$90,000	\$40
\$90,001	\$100,000	\$45
Over \$100,000 0.05% of AGI		

- I CERTIFY that I NEVER buy anything which would require me to pay use tax
- I kept track and here is the total amount I spent on which I owe use tax: \$ _____
- I estimate that I bought \$ _____ worth of stuff on which I owe use tax.
- Please use the "safe harbor" chart at the left to figure my use tax.

If you use the safe harbor, you must add any single item that cost \$1,000 or more. Check here if you bought any one thing costing \$1,000 or more in a sales-tax-free situation.

Would you like to donate to any of the following (to be deducted from your refund or added tax due)?
Green Up VT \$ _____ Children's Trust Foundation \$ _____
Nongame Wildlife Fund \$ _____ VT Veterans Fund \$ _____

Renters Credit:

Did you pay rent for at least 6 months? Yes No Number of months _____

Did you live in Vermont all of 2022? Yes No Is your rent subsidized? Yes No

You might be eligible for some credit if your income is under about \$27,000 for a single person, \$32,000 for a couple and \$42,000 for a family of four. You can check eligibility here:

<https://tax.vermont.gov/individuals/renter-credit>

You do not need a landlord certificate anymore but we need the SPAN number. **Your landlord must still file a landlord certificate with the state.**

SPAN # _____ We no longer need your household income.

Property Tax Credit:

If you **own** your Vermont home please give us a **copy of your 2022 property tax bill**, check this box and complete the **Household Income** section on the next page.

Vermont Household Income For Homeowners

(Skip this section if you do not want property tax assistance. Renters can also skip)

Please list everyone (other than you and your spouse) who lived in your home at any time during 2022:

_____	_____	_____
Name	Relationship	Income
_____	_____	_____
Name	Relationship	Income
_____	_____	_____
Name	Relationship	Income
_____	_____	_____
Name	Relationship	Income

Please give us a copy of their income tax return if they filed one. Include kids, even if they are not dependents, and roommates (but not pets) and friends and family members even if they did not live with you all year.

Snow Birds: did you RENT OUT your VT home during 2022? Yes No Not Sure

Although not taxable, the income listed below must be included in household income.

Do you or any household members receive or pay child support? Yes No Not Sure

Did you or any household members receive any of the following: (check any that might apply) or NONE

- Veterans Benefits Military Allowance Hobby Income Gifts over \$6500
 Workers Compensation Welfare (not including food stamps or fuel assistance) Lottery or other prize (of any amount)

Did any of your dependent children **earn** (from a job) more than \$6,500? Yes No Not Sure

Did your dependents have **any unearned income** (social security, bank interest)? Yes No Not Sure

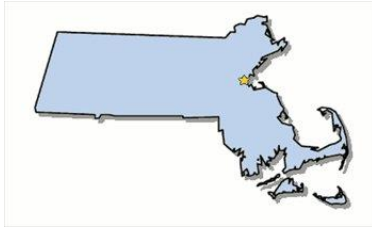
If this page is not completed, we will assume you do not want or do not think you qualify for assistance.

Homeowners are eligible for property tax credit depending on their school property tax relative to their income up to \$134,800.



Signature _____ Date _____





Massachusetts Residents Only

Rent & Senior Circuit Breaker Credit:

Do you rent your house or apartment? Yes No If yes, how much for the year? _____ Name & address of your landlord: _____

Does anyone else (other than your immediate family) live with you? _____

If you are **at least 65** as of 1/1/23 and OWN your home, check here: and include a copy of your property tax bill. Total property tax paid: \$_____ & total **water & sewer** paid \$_____

Medical Insurance:

Did everyone in your household have medical insurance for all of 2022? Yes No Not Sure

If your insurance was through **Medicare** or **Medicaid**, Check here:

If your insurance is through a Massachusetts employer, please give us the forms you would have received from them.

Use Tax:

Use tax is tax due on items you purchase without paying sale tax and then USE in Massachusetts. This includes items purchased in NH or online or from a catalogue where the seller doesn't collect sales tax. **If you shop at Walmart in Hinsdale or Target in Keene for anything other than clothes, prescriptions and food, you owe use tax.** Amazon is now collecting sales tax from Massachusetts customers but not all of their vendors do. (For more information about this ask your preparer or go to: <https://www.mass.gov/service-details/individual-use-tax>)

Mass AGI Per Return*	Use Tax liability
\$0 - \$25,000	\$0
\$25,001 - \$40,000	\$20
\$40,001 - \$60,000	\$31
\$60,001 - \$80,000	\$44
\$80,001 - \$100,000*	\$56

If the Massachusetts AGI per return* is above \$100,000, multiply by .000625.

Mass wants but **no longer requires** your **Driver's license** or ID information: Number: _____
Issue date: _____ Expiration date: _____

Here are your choices:

- I CERTIFY that I NEVER buy anything which would require me to pay use tax (we will enter \$0)
- I kept track and here is the total amount I spent on which I owe use tax: \$_____
- I estimate that I bought \$_____ worth of stuff on which I owe use tax.
- Please use the "safe harbor" chart at the left to figure my use tax.

If you use the safe harbor, you must add any single item that cost \$1,000 or more. Check here if you bought any one thing costing \$1,000 or more in a sales-tax-free situation.

Charitable Contributions:

Would you like to contribute to any of the following MA charities? (to be deducted from your refund or added tax due)

Organ Transplant Fund \$_____ MA HIV & Hepatitis Fund \$_____ MA US Olympic Fund \$_____
Endangered Wildlife Conservation \$_____ MA Military Family Relief Fund \$_____ Homeless Animal Care \$_____



Signature _____ Date _____



Residents of All **Other** States

(Not VT, NH or MA)



In which state do you live? _____

(This is not always a simple question. If you are not sure, talk with your preparer about this.)

NY residents: we need your current driver's license number, issue date, expiration date and document number from the back.

We are familiar with other states' income tax requirements and able to prepare returns from most states.

Although we will research your state's requirements before completing the return, if you aware of any particular quirk or benefit available, please let us know about it.

If you are a resident of any state **OTHER THAN**

- Alaska.
- Delaware.
- Montana.
- New Hampshire.
- Oregon.
- Massachusetts or
- Vermont

Please complete the following:

Use Tax

Use tax is tax due on items you purchase without paying sale tax and then USE in your home state. This includes items purchased in NH or online or from a catalogue where the seller doesn't collect sales tax Amazon is now collecting sales tax for many states but not all of their vendors do. (For more information about this ask your preparer or google "individual use tax" with the name of the state.)

Here are your choices:

- I CERTIFY that I NEVER buy anything which would require me to pay use tax (we will enter \$0)
- I kept track and here is the total amount I spent on which I owe use tax: \$_____
- I estimate that I bought \$_____ worth of stuff on which I owe use tax.
- Please tell me more about the "safe harbor" in my state to figure my use tax.

If you are self-employed, and you bought anything in a sales-tax-free situation, check here

Signature _____ Date _____



3/6/23

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Please note that the penalties for failure to disclose foreign interests are severe and can include forfeiture of the account and jail though there may be amnesty programs available. Please ask us for additional information.

Skip this page if you initialed the bottom of page 3 (because you have no foreign connections.)

Foreign Interest Worksheet 2022 tax year

Please check the appropriate box and include all necessary details.

These questions do not apply if your only foreign interest is THROUGH A U.S. BASED investment firm.

Do you have any financial or **retirement** account in any country other than the United States?

Yes No Not Sure

If "Yes," did the total assets exceed \$10,000 at any time during the year? Yes No Not Sure

If "Yes," please gather records of bank names and addresses and account numbers and maximum balances and ask for the foreign issue worksheet to see what information we will need.

Can you sign checks for any accounts that were opened in any country other than the United States?

Yes No Not Sure

Do you have any relatives or close friends who live abroad?

Yes No Not Sure

If "yes," is it possible that they have added your name to a bank account? Yes No Not Sure

Is it possible that you have been given Power of Attorney or a similar authority for them?

Yes No Not Sure

Do you receive a foreign pension or other benefits or payments from a foreign country or do you have a foreign pension you are not drawing yet?

Yes No Not Sure

Are you the beneficiary of a trust located in a foreign country?

Yes No Not Sure

Did you receive a gift or inheritance from anyone living in a foreign country?

Yes No Not Sure

Do you own (or have a share in) real estate in a foreign country?

Yes No Not Sure

Do you have a life insurance policy or own an annuity in a foreign country?

Yes No Not Sure

Do you have an interest in a corporation or other business entity located in a foreign country

other than through a US based investment company?

Yes No Not Sure