

**Questionnaire 2023**

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.**

Names: \_\_\_\_\_ 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 you might 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 online.**

- paying by scheduled direct debit\* (we enter your bank info but you verify it)
- paying online (we won't give you vouchers to mail with a check)
- mailing a check (Still available but should be avoided. If you send a check and then get a notice of tax due, please check to see if the check has cleared. If it has NOT cleared, we ask that you wait for a second bill before asking us for help.)

\*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 & 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** 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 (**online** or in person) or fantasy

sports? (Includes any amount even if small. You cannot use losses to offset wins in all cases!

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 have any retirement funds sent directly to a charity? (called a QCD) 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

Are you a member (owner) of an **LLC**, or a partner or shareholder in a partnership or corporation?

(Starting in 2024, Beneficial Ownership Reporting is required—more info then!) Yes  No  Not Sure

Did or do you own any cryptocurrency or receive any as a gift or award? Yes  No  Not Sure

“Cryptocurrency” (like Bitcoin) includes “non-fungible tokens” (NFTs) such as digital trading cards.

## Medical Insurance

If your Medical insurance was through Vermont Health Connect or another Healthcare Exchange **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 or Form 1095A, check here

## Miscellaneous Information

Did you **give** more than \$17,000 (cash or something of value) to anyone? Yes  No  Not Sure

Did you change the deed on your home to give a share to anyone (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 2023? 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 2023? 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 make any energy improvements to your home, buy any efficient water heating, heating or cooling equipment or buy a car which is considered a “clean vehicle”? Yes  No  Not Sure

We will need a receipt, any documents you have showing it is “energy star” qualified, VIN or other info about efficiency. The lifetime limits on replacement windows, doors, skylights, and insulation are gone!

Did you lose property in a federally declared disaster area during the year? Yes  No  Not Sure

Did you get any unexpected letters 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

This section is meant to help you avoid ACCIDENTALLY violating the complex reporting requirements. The penalties start at around \$10,000. You do not have to have ANY FOREIGN INCOME to get these penalties. Do you have any connection with any **foreign countries** (including Canada)? Connections may include: bank accounts, pensions, real estate owned, relatives or close friends living abroad who may have given you power over or access to accounts in another country? Or, 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: \_\_\_\_\_

If you answered “Yes” or “Not Sure” please ask for and complete the Foreign Interests Worksheet.

## SIGNATURE

Signature \_\_\_\_\_ Date \_\_\_\_\_

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# Vermont Residents Only - 2023

Did everyone in your household have medical insurance for all of 2023? 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 catalog 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 \$ \_\_\_\_\_

## Homestead Declaration & Property Tax Credit:

If you **own** your Vermont home please give us a **copy of your 2023 property tax bill**, check this box  and complete the **Household Income section on the next page**.

Even if you do not qualify for or want the property tax credit, your homestead still needs to be declared!

Did (or will) you continue to own your Vermont property as your primary residence on April 1 of **2024** and was Vermont your domicile for all of **2023**? Yes  No  Not Sure

## Renters' Credit:

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

Did you live in Vermont all of 2023? Yes  No  Is your rent subsidized? Yes  No

You might be eligible for some credit if your income is under about \$31,750 for a single person, \$36,300 for a couple and \$45,350 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 do need the SPAN number. **Your landlord must still file a landlord certificate with the state.**

SPAN # \_\_\_\_\_ We no longer need household income for renters!

# Vermont Household Income for Homeowners Property Tax Credit

(Skip this section if you do not want property tax assistance)

Please list everyone (other than you and your spouse) who lived in your home at any time during 2023:

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 and friends and family members even if they did not live with you all year.

Snowbirds: did you RENT OUT your VT home during 2023? 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

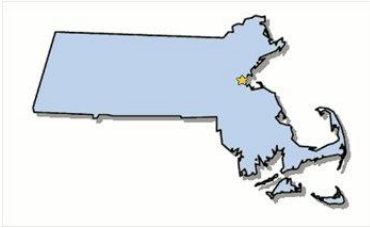
Did your dependents have **any unearned income** (social security, bank interest)? Yes  No  Not Sure

**If this page is not completed, we will assume you do not want assistance.**  
Homeowners are eligible for property tax credit up to \$8,000 (depending on their school property tax relative to their income) if household income is \$128,000 or less.



Signature \_\_\_\_\_ Date \_\_\_\_\_





# Massachusetts Residents Only

## Rent & Senior Circuit Breaker Credit:

Do you RENT your house or apartment? Yes  No  If yes, rent paid in 2023: \_\_\_\_\_

Name & address of your landlord: \_\_\_\_\_

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

If you were **at least 65\*** as of 12/31/23 and OWN your home, check here:  and include a copy of your property tax bill. Total property tax paid: \$\_\_\_\_\_ & total **water & sewer** paid \$\_\_\_\_\_  
(If not paid through property taxes)

## Medical Insurance:

Did everyone in your household have medical insurance for all of 2023? Yes  No  Not Sure

Please advise how you get your health insurance:

**Private Insurance including Connector Care:**  **or MASS Health:**  **or Medicare:**

**or US Military:**  **or Other:**  \_\_\_\_\_

*If your insurance is through a Massachusetts employer, we must have the Form 1099-HC 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 catalog 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/info-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 items on which I owe use tax.
- Please use the "safe harbor" chart 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 Prevention and Care \$\_\_\_\_\_



Signature \_\_\_\_\_ Date \_\_\_\_\_

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# Residents of All Other States - 2023

(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—a copy of BOTH SIDES would be great.

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

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

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

- Alaska
- Delaware
- Montana
- Oregon

### Then, please complete the following section about "Use Tax"

Use tax is tax due on items you purchase without paying sales tax and then USE in your home state. This includes items purchased in New Hampshire, Alaska, Delaware, Montana, or Oregon or online or from a catalog 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 DID NOT buy anything which would require me to pay use tax which means 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 items 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 \_\_\_\_\_

