Updegrove, McDaniel, McMullen & Chiccehitto, PLC

2022 INDIVIDUAL TAX QUESTIONNAIRE (FORM 1040)

Please check the appropriate box and include an explanation if applicable. Details and documentation must be provided with your tax return information at the beginning of the year, or with this questionnaire.

Name: ____________________ **Preferred method of contact:** ____________________

Taxpayer Email: ____________________ **Spouse Email:** ____________________

Taxpayer Phone: ____________________ **Spouse Phone:** ____________________

	Yes	No	Explanation
Personal Information			
1. Did your marital status, dependents, or address change during the year?	☐	☐	
2. Were you a resident of, or did you have income from more than one state during the year?	☐	☐	
3. Did you make gifts of more than $16,000 to any individual?	☐	☐	
Income Information			
1. Did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency (Bitcoin, Ethereum, other digital currency)?	☐	☐	
2. Did you receive any proceeds from:			
a. Business, farm, or rental property?	☐	☐	
b. An installment sale?	☐	☐	
c. A Health Savings Account (HSA)?	☐	☐	
d. Alimony?	☐	☐	
e. Social Security?	☐	☐	
f. Unemployment or disability?	☐	☐	
g. Side business (Uber, Internet sales) or barter income?	☐	☐	
h. An education savings or 529 Plan account?	☐	☐	
i. An employer stock bonus plan?	☐	☐	
3. Did you convert a traditional IRA to a Roth IRA?	☐	☐	
Foreign Information			
1. Did you have an interest in or signature authority over a financial account in a foreign country?	☐	☐	
2. Were you the grantor of or transferor to a foreign trust?	☐	☐	
3. Did you receive income from or pay tax to a foreign government?	☐	☐	
Deduction Information			
1. Did you maintain a home office that you used exclusively for business?	☐	☐	
2. Did you contribute to, or would you like to contribute to a self-employed retirement plan?	☐	☐	
3. Did you contribute to, or (if eligible) would you like to contribute to an HSA?	☐	☐	
4. Did you contribute to, or would you like to contribute to a traditional or Roth IRA?	☐	☐	
5. Did you pay for child care while you worked or looked for work?	☐	☐	
6. Do you have evidence to substantiate charitable contributions?	☐	☐	
7. Did you make any noncash charitable contributions? Please provide documentation for donations over $500.	☐	☐	
8. Did you have substantial out-of-pocket medical expenses that exceed 7.5% of your income?	☐	☐	
9. Did you, your spouse, or your dependents pay tuition or student loan interest?	☐	☐	
10. Did you make any contributions to an education savings or 529 Plan account?	☐	☐	
11. Did you purchase or sell a business, farm, or rental property during the year?	☐	☐	
12. Did you acquire a new or additional interest in a partnership, LLC or S corporation?	☐	☐	
13. Did you dispose of any stock during the year?	☐	☐	
14. Did you take out a home equity loan or refinance a principal/second residence this year?	☐	☐	

Health Care Information

1. Did you have lower cost Marketplace Coverage under the Affordable Care Act? If yes, please provide any Form(s) 1095-A you received. ☐ ☐
2. Did you pay long-term care premiums for yourself or your spouse? ☐ ☐

Miscellaneous Information

1. Did you receive an identity protection PIN from the state or the Internal Revenue Service? If so, please provide. ☐ ☐
2. Have you received any IRS or state tax notices or other correspondence? ☐ ☐
3. Would you like direct deposit if entitled to a refund? ☐ ☐
   If so, please provide:
   Savings or Checking: ____________________
   Bank Routing Number: ____________________
   Account Number: ____________________
4. Do you expect your 2023 income and expenses to be similar to 2022? ☐ ☐
5. Are there any tax, personal financial or tax planning issues on which you would like us to focus? If yes, please explain or contact us. ☐ ☐

Please provide the dates and estimated tax payments paid:

Federal Estimates:

Due Date	Date Paid	Amount
Q1 – 4/15/22		
Q2 – 6/15/22		
Q3 – 9/15/22		
Q4 – 1/17/23		
Additional		

Virginia (or other state) Estimates:

Due Date	Date Paid	Amount
Q1 – 5/01/22		
Q2 – 6/15/22		
Q3 – 9/15/22		
Q4 – 1/17/23		
Additional		