



Welcome back! Please complete this short form so we can update our records.

Taxpayer Name

Spouse Name

Address

E-mail

Telephone

Preferred Contact Method

Email     Phone     Text Cell Phone: \_\_\_\_\_

Dependents you are Claiming

Point of Contact (if different from Taxpayer/Spouse)

Filing Status (select one)

Single                       Married Joint  
 Married Separate         Head of Household  
 Unsure

Have you signed our current 2022 tax engagement letter? \*

Yes  
 No

\*We will not begin until this is received.

At any time in 2022, did you receive, sell, exchange, or dispose of any virtual currency?

Yes\*\*  
 No

\*\*Tax documents are required and additional fees apply

How will you sign your return once completed?

Electronically via portal  
 In person at J&J's office

How would you like us to return your tax documents?

I will pick them up within 30 days of my return being completed  
 I have the originals and would you to shred them  
 Please mail them to me. I acknowledge, I will be invoiced for the postage

Package Selected:  Essential     Preferred     Advantage     Selected online

Notes/Comments

## Questionnaire

**These are not required but can be very helpful in saving tax dollars!**

YES      NO

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have financial interest in or signature authority over a financial account or asset located in a foreign country?                         |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you sell a primary residence during the year?<br>If "Yes" provide a closing documentation for the purchase and sale of the home.              |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you refinance any properties during the year?<br>If "Yes" provide a closing documentation for refinance                                       |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you active-duty military?<br>If "Yes" provide your state home of record _____   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you move to a different state during the year and if so what date?<br>If "Yes" provide date of move and from which state to which state _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make contributions to a Roth account? \$_____ (taxpayer) \$_____ (spouse)   |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year? \$_____  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any contributions to 529 college savings plan \$_____  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase an Electric Vehicle – Purchase agreement required  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase Solar Panels- Purchase agreement/invoice required  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any childcare expenses? (Childcare statement(s) required)  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you, your spouse or your dependents have any college expenses (1098T required)  |

New Client or New Dependents – provide dates of birth below

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