

Name(s):	Phone Number(s):
Occupation(s):	Email Address:

Home/Mailing Address:

DAVID C. BRYANT, CPA - INDIVIDUAL INTERVIEW - 2022 INCOME TAX RETURN

Yes	No	Question / Response
		Did you receive a 6-digit PIN from the IRS (identity theft)? <i>If YES, please provide:</i> _____
		Has your filing status changed? <i>If YES, please select a box below:</i> <input type="checkbox"/> Married (Date: _____) <input type="checkbox"/> Divorced (Date: _____) <input type="checkbox"/> Taxpayer Death (Date: _____) <input type="checkbox"/> Spouse Death (Date: _____)
		Did you move in 2022? <i>If YES, please provide the date your address changed:</i> _____
		Did you purchase/sell/refinance a house? <i>If YES, please provide your closing disclosure(s).</i> <i>*We will need the disclosure for the SALE of your previous home AND the disclosure for the PURCHASE of your new home.</i>
		If you have a home equity loan or line of credit, was it used to buy or improve a 1 st or 2 nd residence? <i>If NO, what was it used for?</i> <input type="checkbox"/> consolidate debt <input type="checkbox"/> buy car/boat <input type="checkbox"/> other: _____
		Did you purchase insurance through the Health Insurance Marketplace at any time in 2022? <i>If YES, please provide 1095-A.</i>
		Did you make any estimated tax payments? <i>If YES, please see 2nd page.</i>
		Did you pay or receive alimony? <i>If YES, date of divorce:</i> _____
		Have you had any debts cancelled or reduced? <i>If YES, we will need a 1099-C.</i> ➤ Was it part of bankruptcy? <i>If YES, we will need the bankruptcy documents.</i>
		Did you contribute to an IRA, other than through your employer? <i>If YES, complete below:</i> <input type="checkbox"/> Traditional (Amount: _____) <input type="checkbox"/> Roth (Amount: _____)
		Did you take a distribution from an IRA, 401K, or 403B? <i>If YES, mark which and how many accounts:</i> <input type="checkbox"/> IRA _____ <input type="checkbox"/> 401K _____ <input type="checkbox"/> 403B _____ ➤ Was this a coronavirus-related early distribution from 2020 (spread out over 3 years)? ➤ Was any part of this distribution paid <i>directly</i> to a charity?
		Did you buy or sell stock?
		Did you buy or sell company stock in 2022 from an employer that you work or worked for?
		Did you contribute to/receive distributions from your Health Savings Account? <i>NOT flex spending.</i>
		Do you pay for long term health care? <i>Not health insurance; only long-term care.</i>
		Are you an active member of the Armed Forces or Reservist?
		Did you receive a military pension?
		Do you have a financial interest in or signature authority over any foreign financial accounts?
		Did you buy, sell, receive, or send cryptocurrency in 2022? <i>If YES, please provide us with more information regarding the transactions.</i>
		Did you start a new business or purchase rental property during 2022?
		Do you own a rental property? <i>If YES, how many hours worked at each property?</i> _____
		Did you sell an existing business, rental, or other property during 2022?
		Did you purchase a qualified electric vehicle or qualified fuel cell vehicle in 2022?
		Did you gift anyone \$16,000 or more in dollars or property? <i>If YES, a gift tax return is needed.</i>

Was there a change in your dependents? *If YES, please select a box below:*

Add Dependent Name: _____ Date of Birth: _____ SSN: _____

Remove Dependent Name: _____ Reason for Removal: _____

Do you have a child, age 17-23, whom is a student and had lived with you for **over** half the year (whether away at college or not) **OR** a non-child relative that you supported?

Did you pay childcare costs for a dependent child under age 13 so you could work? *If YES, please see below.*

Did you or your child go to college full time (6 credits) for at least one semester? *If YES, what year of college?* **Freshman** **Sophomore** **Junior** **Senior**

Did you make any contributions to an education savings or 529 plan account?

Were distributions from a 529 plan used to pay for your child's tuition? *If YES, please provide 1099-Q.*

If you receive a refund, would you like it to be direct deposited?

If you owe money, would you like it to be directly withdrawn?

➤ **IF YES TO EITHER QUESTION ABOVE:** please provide a voided check or write your bank name, routing, and full account number here: _____

➤ **If the requested bank information above is NOT provided and you receive a refund, it will be sent to you as a check via mail.**

Estimated Tax Payment Information

<i>Date of Payment</i>	<i>Amount</i>	<i>Paid to (Fed/State/Local)</i>	<i>Date of Payment</i>	<i>Amount</i>	<i>Paid to (Fed/State/Local)</i>

Childcare Information

<i>Child's Name</i>	<i>Provider Name</i>	<i>Address</i>	<i>EIN</i>	<i>Cost</i>

NEW CLIENT SECTION

Please provide a copy of your previous year's tax return and complete the information below.

	<i>Name</i>	<i>Date of Birth</i>	<i>Social Security Number</i>
<i>Taxpayer</i>			
<i>Spouse</i>			
<i>Dependent</i>			
<i>Dependent</i>			

Referred by: _____

By signing below, you verify that all data given to David C. Bryant, CPA, may be used in preparation of your 2022 individual income tax returns.

Signature of Interviewee

Date of Interview