

SALAS ACCOUNTING LLC
2022 INCOME TAX QUESTIONNAIRE
UPDATE PERSONAL INFORMATION

NAME:

CELL PHONE:

EMAIL:

If filing a joint return, these questions apply to both spouses.

IDENTIFICATION

- 1) **In the last year, did you renew your driver's license or State ID?**

If, yes, we need a copy of the front & back of your ID.

If filing a joint return, the same is needed for your spouse.

YES NO

--	--

--	--

UNEMPLOYMENT INCOME

- 2) In 2022 did you collect unemployment income?

If yes, we need your 1099. One can be printed from the state online services website.

If filing a joint return, the same is needed for your spouse.

YES NO

--	--

--	--

VIRTUAL CURRENCY

- 3) Did at any time during 2022, did you receive, sell, exchange, gift, or otherwise dispose of a digital asset?

YES NO

--	--

BANKING INFORMATION

- 4) If receiving a refund, do you prefer direct Deposit?

If yes, has your banking information changed since last year?

If new, provide a copy of a voided check.

The banking info will appear on the tax return. It is your responsibility to check the accuracy of the account information before signing the consent forms.

YES NO

--	--

- 5) Would you like to pick up your tax return once it's ready?

YES NO

--	--

COMMON FORMS AND INFORMATION NEEDED

1099 INT - BANKING INTEREST

1099 DIV - DIVIDEND INCOME

1099 SSA - SOCIAL SECURITY BENEFITS

1099R - RETIREMENT INCOME FROM PENSION OR IRA'S

1099B - BROKERAGE ACCOUNT ON INVESTMENTS.

1098T - STUDENT TUITION FORMS (Must log into the student's account to get it)

1098 - MORTGAGE INTEREST

1095A - HEALTHCARE FORM FOR THOSE WHO HAVE IT FROM THE MARKETPLACE

PROPERTY TAX AND CHARITABLE RECEIPTS