

Brown Financial LLC

Name: _____

2022 Tax Questionnaire

If any of the following items on any of the **THREE** pages pertain to you or your spouse for 2022, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

Yes	No	
		Did your marital status change during the year?
		Did your address change during the year?
		Are you or your spouse a veteran who was honorably discharged? If so, have you claimed the NJ Veterans Credit in a prior year?

DEPENDENTS

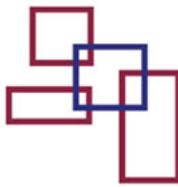
Yes	No	
		Is another person providing more than half of your financial support and could you be claimed as a dependent on their tax return for 2022?
		Were there any changes in your dependents? Such as your child claiming themselves on their taxes or a new baby? Please provide the birth certificate and SS card of any new children.
		Did you have any children with total investment income in excess of \$2,300? (Children under age 19 or full-time students under age 24 at the end of 2022.)

HEALTH CARE COVERAGE

Yes	No	
		Did you apply for health care coverage on Healthcare.gov or GetCovered.NJ? If so, did you download your Form 1095-A?
		Did you take a distribution from, or make a contribution to, an HSA? If so, did you receive the associated 1099-SA and 5498-SA?

INCOME

Yes	No	
		Have you received statements from all income you earned this year? See our Tax Document Checklist for a list of the most common forms.
		Did you receive any unemployment or disability income? If so, have you downloaded your 2022 1099-G from your state's website?



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BUSINESS

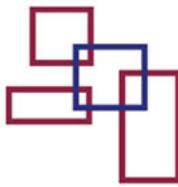
Yes	No	
		Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, or trust? Please provide copies of the formation documents.
		Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
		Did you use your car on the job (other than commuting to and from work)? If so, did you track your business mileage?

PURCHASES, SALES, AND DEBT

Yes	No	
		Did you buy or sell any stocks, bonds, or other investment property? If so, have you received your 1099-B or consolidated tax statement?
		Did you purchase or sell your home? (Please provide closing statements for each purchase and/or sale.) Did you refinance or take a home equity loan? (Please make sure to provide all 1098 forms.)
		Did you buy an electric vehicle or make any home purchases involving solar, wind, or geothermal energy? If so, we will need to see your receipt to determine if a credit can be claimed.
		Did you make any residential energy-efficient improvements? If so, please provide your receipt so we can determine if a credit can be claimed.
		Cryptocurrency – During 2022, did you (a) receive (as an award or payment for property or services) or (b) sell, exchange, gift, or otherwise dispose of a digital asset? For each account/wallet/exchange, please provide the associated 1099 tax form, or if unavailable then a year-end statement.

RETIREMENT PLANS

Yes	No	
		Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? Was it due to COVID? Did you receive your 1099-R form(s)?
		Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? Please provide form 5498 if received.
		Did you transfer or rollover any amount from one retirement plan to another retirement plan? Did you receive your 1099-R form(s)?



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EDUCATION

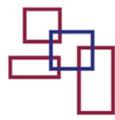
Yes	No	
		Did you, your spouse, or a dependent incur any tuition expenses to attend a college, university, or vocational school? If so, we will need form 1098-T showing total tuition paid during 2022.
		If yes, have you previously received the American Opportunity Tax Credit (AOTC)? How many years have you claimed this credit? (Maximum 4 years of credit for undergrad only, with income limits.)
		If yes, did you receive a distribution from a 529 Education Savings Account or a Qualified Tuition Program? Please provide form 1099-Q

ESTIMATED TAXES

Yes	No	
		Did you apply an overpayment of 2021 taxes to your 2022 estimated tax (instead of being refunded)?
		If you have an overpayment of 2022 taxes, do you want the excess applied to your 2023 estimated tax (instead of being refunded)?
		Do you expect your 2023 taxable income and withholdings to be different from 2022?

MISCELLANEOUS

Yes	No	
		May the IRS discuss your tax return with your preparer?
		For direct deposit of refunds or payment of taxes, did your bank account change from the one used on your 2021 tax return?
		Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?
		Did you receive a distribution from, or were you the grantor of or transferor to, a foreign trust?
		Did you or your spouse make any gifts to an individual that total more than \$16,000, or any gifts to a trust?
		Were you notified or audited by either the Internal Revenue Service or your state taxing agency? Please provide copies of those notices.
		What is your preferred contact method for when we need to get in touch with you? (email, phone call, text)



2022 Tax Document Checklist

Please upload, email, or bring the following documents to your tax appointment, as applicable:

- Driver's licenses or other photo ID
- W2
- Last paystub of the year
- Social Security 1099s
- 1099-B Investment/Stock Sales
- 1099-INT Interest income
- 1099-DIV Dividend income
- 1099-R Retirement income
- 1099-NEC Non-employee compensation
- 1099-G Unemployment compensation
- 1099-C Cancellation of debt
- 1095-A Healthcare form only if purchased through healthcare marketplace
- 1098-E Student loan interest
- 1098-T Tuition paid
- 1098 Home mortgage interest
- HUD-1 Closing statement if you have sold or purchased a property
- K-1 Partnerships, S-corps, or Trusts
- W-2G Gambling winnings
- HSAs have 2 associated forms: 1099-SA and 5498-SA
- Property tax card or tax receipts, if not paid through mortgage escrow
- Year-end cryptocurrency statement, or 1099 form if available

Children:

- Childcare statements or receipts – day camp counts! (Tax deduction only applies for children aged 12 and under as of 12/31/2022)
- Birth certificate and copy of Social Security card for any new babies

Please provide annual totals instead of receipts (but keep the receipts for your records):

- Out-of-pocket \$ paid for medical care, dental care, prescriptions, eyeglasses, or contacts
- Out-of-pocket \$ paid for supplemental health insurance or long-term care insurance
- Donations to **qualified** charities (MUST be a 501(c)(3) or equivalent, GoFundMe may not count)
- Medical mileage and/or charitable mileage

Investment Accounts:

If you have investment accounts with sale transactions, your 1099-B can be mailed as late as March 15, 2023. Investment companies often amend tax information, so you may receive an amended Form 1099 in February or March, even if you receive one in January.