



Tax Planning Questionnaire for year ending December 31, 2022

Name:

Please check the box for each question and provide details where applicable.

Y N N/A

Did you have a substantive change in income for last year?

If your PY return included estimated payments for the CY did you make all of the payments (if yes, provide dates and amounts below)

US Amount	Date Paid	State Amount	Date Paid
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Did you have any changes to your dependents in the current year?

Did you invest in/sell an interest in a business (new K-1)?

Did you buy or sell any real property (home, rental house, land, etc.)?
If yes, please comment below.

Comments