



Planche • Politz • Ledet *LLC*
Beyond the Numbers

Client Name

Tax Planning Questionnaire
For the Year Ending December 31, 2023

Please check the box in response to each question and provide details where applicable.

- | | | | |
|--------------------------|--------------------------|--------------------------|--|
| Y | N | N/A | |
| <input type="checkbox"/> | <input type="checkbox"/> | | Did you have a substantive change in income from last year? |
| <input type="checkbox"/> | | <input type="checkbox"/> | If your prior year return included estimated tax payments for the current year did you make any of the payments (if yes, provide dates and amounts). |

<u>US Amount</u>	<u>Date Paid</u>	<u>State Amount</u>	<u>Date Paid</u>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- | | | |
|--------------------------|--------------------------|--|
| Y | N | |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any changes to your dependents in the current |
| <input type="checkbox"/> | <input type="checkbox"/> | year? Did you invest in/sell an interest in a business? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any real estate (personal residence, rental property, land, etc)? If yes, please provide details in the box below. |

Additional Details