



YES NO

YES	NO	
		26 Did you cash any series EE or I U.S. Bonds that were issued after 1989 to pay for college?
		27 Did you receive any state or local income tax refunds from prior years (other than your 2021 refund)
		28 Did you or your spouse receive any social security benefits during the year? Please provide Form SSA-1099
		29 Did you receive any payments from a pension, profit sharing or 401(k) plan during 2022? Please provide Form 1099-R's
	*	30 Did you take any distributions from your retirement plan due to COVID-19 in 2020? If yes, Did you pay the tax in full in 2022 or elected to pay the tax on the distribution in 3 years? Or pay it all back to your retirement account in 3 years?
		31 Did you make any withdrawals from, or contributions to, an IRA, ROTH, Keogh, Simple, SEP, 401K, myRA or any other qualified retirement plan during the year?
		32 Do you or your spouse have any IRA accounts? If so, what kind? (i.e. traditional or ROTH)
		33 Have you ever made a nondeductible contribution to a traditional IRA? Or "Backdoor" Roth?
		34 Did you or your spouse contribute funds to either a traditional or ROTH IRA?
		35 Did you withdraw money from any retirement accounts or "rollover" a retirement plan into another plan? (Including your RMD)
		36 Did you convert any retirement funds to ROTH funds?
		37 Did you recharacterize any IRAs this year?
		38 Did you receive a Schedule K-1 from a Partnership, S-Corp, Trust or Estate? If so, please attach
		39 Did you receive any disability income during 2022? Please include Form 1099-R or W2.
		40 Did you receive any type of prize or award during 2022, including lottery winnings?
		41 Did you incur any gambling winnings/losses during 2022? Please provide win-loss statements and summary of winnings (from the casino). Do you track your daily wins and losses? If so, please provide daily net wins/losses. Also provide any Form W-2G's that you received as well as a summary sheet of W-2G's received (can be obtained on casino website)
		42 Did you or your spouse receive any unemployment benefits during 2022 (please provide 1099-G)?
		43 Did you receive CT paid family leave in 2022? This is taxable to Federal & CT. We will need this form.
		44 Did you or your spouse receive any Combat Pay or Jury Duty Pay?
		45 Did you or your spouse receive any alimony, or separate maintenance payments? - (Note please be aware that there are changes for divorces occurring prior to 01/01/2019). If yes, how much and divorce date?
		46 Were you given any stock options and/or did you exercise any stock options in 2022? If yes, additional info may be needed.
		47 If you receive(d) restricted stock at work, did any become vested in 2022???
		48 Did you have any credit card debt forgiven in 2022? Did you receive a 1099C?
		49 Does anyone owe you money which has been deemed uncollectible by the appropriate authorities?
		50 Did you receive any income not mentioned in the above questions? If so, what kind? _____

**BUSINESS/ RENTAL INFORMATION**

		51 Do you own a business? A) Please explain your business activities _____ B) Please provide all business income and expenses.
		52 Did you use your vehicle for your business? (Please provide mileage log)
		53 Did you make any payments in 2022 that would require you to send out Form 1099? If yes, did you or will you send out all required forms?
		54 Did you pay health insurance premiums for your employees during the year? And if so, did you obtain the insurance from the marketplace (small business health options program (SHOP)?
		55 Did you receive any PPP-Loan, EIDL, or any type of Grants from State or federal? If so, how much? Please confirm Dates and Amounts forgiven.
		56 Did you report as income all of the cash you collected in 2022?
		57 Did you purchase any business assets (furniture, equipment, etc.) or convert any assets to business use during the year? If yes, please list on an attached sheet the date placed in service, cost or basis of asset, and business use percentage.







YES NO

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