



Taxpayer: \_\_\_\_\_ Spouse: \_\_\_\_\_

**TAX INTERVIEW GUIDE**

Please answer questions for the **current tax year 2023** unless otherwise requested.

**Purpose:** To ensure we've asked all appropriate questions as required by the IRS and your state tax agency and to help us get the best results for your tax return.

Check **Y** or **N** for all questions. For all "yes" answers see the "**Documents needed**" column to see what information we will need to properly complete your return.

**Personal Information**

	Y	N	Documents needed
Marital status on 12/31/2023 <input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Widowed (not remarried) <input type="checkbox"/> Divorced <input type="checkbox"/> Separated			
Did IRS send you/spouse an Identity Protection Pin Number (IP Pin)?			IP Pin Letter
Would you like information on how to obtain an Identity Protection Pin Number on your own?			
Are either you/spouse legally blind?			Physician Statement(s)
Were you a citizen or resident of <b>another</b> country in 2023?			
Did you change addresses in 2023?			
Were you a full year California resident in 2023?			
If you are entitled to a refund, do you want to have it direct deposited into your account?			Account Info; Voided Check

County of Residence: (**Circle One**)  
**Riverside San Diego San Bernardino Los Angeles Orange Other** \_\_\_\_\_

**Lifestyle**

	Y	N	Documents needed
Did you pay or receive any alimony payments in 2023? Paid Received \$_____			Divorce Decree & Payment records
Do you own or have financial interest in a foreign bank or financial account?			Statements or ?
Are you involved in bankruptcy, foreclosure, or repossession?			Legal records
Have you had any debt cancellation (including credit cards) in 2023?			Form 1099-C or 1099-A
Did you make gifts of more than \$17,000 to one or more individuals during the year?			

**Children, Dependents, Education**

	Y	N	Documents needed
Were any children born or adopted into your household in 2023?			Birth cert, SS Card, Adoption Expenses.
Are you claiming a child that you are not the custodial parent of?			Form 8332
Did you pay for child care while you worked or looked for work?			Payment records
Do you have any children who have unearned income of \$1,250 or more in 2023?			Tax Forms
Did you pay any tuition for a dependent or take classes yourself?			Form 1098-T

Check <b>Y</b> or <b>N</b> for all questions. For all "yes" answers see the "Documents needed" column to see what information we will need to properly complete your return.		Y	N	Documents needed
<b>Income</b>				
Did you receive unemployment income in 2023?				Form 1099-G
Did you have gambling winnings; Casino/Lottery/Other in 2023?				Form W2-G; W/L Stmt / Logs
Do you have income from any hobbies?				Income records
Did you receive any payments from an installment sale?				Contract/Records
Did you receive income for serving on a jury in 2023?				Form 1099-MISC
Have you included all sources of income with your records?				
Are you answering these questions truthfully and to the best of your knowledge?				
<b>Cryptocurrency</b>				
Did you receive any cryptocurrency as a reward, award, or payment for property or services?				Account Statements
Did you sell, exchange, gift, or otherwise dispose of a digital asset or a financial interest in a digital asset?				Tax Forms
Did you receive any tax forms from your virtual cryptocurrency exchange?				Account Statements
<b>Investments</b>				
Did you, or do you plan to, contribute any money to an IRA for 2023? Traditional IRA or Roth IRA				
Did you roll over any amounts from a retirement account in 2023?				Form 1099-R
Did you sell or transfer any stocks, bonds, mutual funds, or other investments?				1099-B; Brokerage Statements
Did you liquidate any worthless investments in 2023?				Records
Were you a victim of Investment theft in 2023?				Records
Did you buy or sell a rental or investment property in 2023?				Final closing statement
<b>Business</b>				
Do you own a business or have interest in a partnership, corporation, LLC, farming activities, or other?				
Did you receive income from a sharing/gig economy activity (e.g., Airbnb, Door dash, Uber, etc.)?				Form 1099-K? other?
Did you sell any items that were used in business or rental transactions?				Sales Records
Did you use your own personal vehicle for business purposes?				Mileage Log
<b>Medical</b>				
Did you have medical insurance for yourself all year?				1095-B, 1095-C, other proof
Did your spouse have medical insurance all year?				1095-B, 1095-C, other proof
Did you purchase health coverage through the state program "Covered California" or other public exchange?				Form 1095-A
Did your spouse purchase health coverage through the state program "Covered California" or other public exchange?				Form 1095-A
Did you, or do you plan to, contribute any money to an HSA for 2023?				
<b>Home</b>				
Did you purchase or sell a main home in during the year?				Final Closing Statement
If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased?				2008+2009 Tax Return
Did you refinance your original purchase mortgage or take a home equity loan?				Final Closing statement

Check <b>Y</b> or <b>N</b> for all questions. For all "yes" answers see the " <b>Documents needed</b> " column to see what information we will need to properly complete your return.	Y	N	Documents needed
Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?			Breakdown of other expenses
Did you make any new energy efficient improvements to your home?			Contract/Certification
Do you own your home?			Property Tax Payments
Did you pay interest on mortgage payments for your home?			Form 1098
Do you rent your home?			
Did you pay any interest on a loan for a boat or RV that has living quarters?			EIN & Address of Lender

**Taxes and Deductions**

Did you make any untaxed out of state purchases in 2023? (eBay, other...)			Total Amount
Did you pay sales taxes on a major purchase in 2023 such as a vehicle, boat, or home?			Contract
Did you donate money to a charity in 2023?			Receipts
Did you donate any goods to a charity			Documentation of value
Did you have any educator expenses?			Total Amount

**Estimated Payments**

Did you make quarterly estimated tax payments to IRS?							
Payment Date	Amount	Payment Method	Payment Date	Amount	Payment Method		
Did you make quarterly estimated tax payments to State?							
Payment Date	Amount	Payment Method	Payment Date	Amount	Payment Method		

By my signature(s) below I acknowledge that I have documentation to support all income and expenses used on my tax return(s). In the event of an audit where such documentation cannot be provided in my defense, I/we hold **Tucker's Tax Service** harmless for any adverse consequences that may be imposed by the Internal Revenue Service, the Franchise Tax Board or other taxing agencies.

\_\_\_\_\_  
Taxpayer Signature Date

\_\_\_\_\_  
Spouse Signature Date

*It is the legal obligation of taxpayers to report all income received and to claim legitimate and documented deductions and credits. By our signatures above we acknowledge that we have provided information necessary to fulfill our legal obligations. The following statement appears on your tax forms in the signature space: "**Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete.**"*