

Personal Tax Year Questionnaire

YES It is my responsibility to provide Next Step Tax LLC with the documents needed to prepare my tax return. I will upload them into the '**FROM Client to NSE**' folder in my BOX account and will notify Next Step Tax once all documents are uploaded.

My expectations of Next Step Tax LLC are:

Describe any significant personal or financial event(s) that occurred in the tax year.

IN THE 2022 TAX YEAR, DID YOU:

- | | | |
|-----|----|---|
| YES | NO | Have a business Name: _____ LLC DBA S-Corp Partnership |
| YES | NO | Own, Buy, or Sell a Home? Include Closing Statement and expenses. |
| YES | NO | Own, Buy, or Sell Rental Property? Include Closing Statement. |
| YES | NO | Receive a Schedule K-1 from a real estate or financial investment? |
| YES | NO | Have income from another state (W-2, 1099, Trust, Royalty)? |
| YES | NO | Sell Crypto Currency? *Provide 1099-B or Statement. |
| YES | NO | Have foreign income, investments, or bank accounts? |
| YES | NO | Have an Investment account (Robin Hood, Schwab, 1099-B)? |
| YES | NO | Have a Retirement account (401K, Roth, IRA, or 1099-R)? |
| YES | NO | Make Estimated Tax payments? *Provide Dates and \$ Amounts. |
| YES | NO | Receive a 1099-G for unemployment benefits? |
| YES | NO | Receive a 1099-NEC for self-employed income? |
| YES | NO | Have documentation (spreadsheet) of self-employed expenses? |
| YES | NO | Receive a W-2? |
| YES | NO | Receive a 1099-DIV for dividend income? |
| YES | NO | Receive a 1099-INT for interest earned from a bank or other source? |

A YES answer means I agree to upload the appropriate document(s) into my BOX account so my tax return is accurate and complete. I will also email Ron@NextStepEnterprises.com that I have uploaded ALL of my documents

