

Please answer all that apply to the current tax year.

TAX YEAR 2023

TAXPAYER & SPOUSE NAME _____

ADDRESS _____

CITY, STATE, ZIP CODE _____

BEST CONTACT PHONE NUMBER _____

EMAIL ADDRESS _____

1. If any of the following have changed since we last prepared a return for you, please fill out an **Information Change Form**:
New Dependent Remove Dependent Marital Status Death of a Spouse or Dependent
2. Do you or your spouse, if applicable, have signing authority on a foreign bank account, or did you have any activity involving a foreign trust?
 Yes **No**
3. Are you or your spouse, if applicable, required to repay a 2008 First Time Home Buyers Credit?
 Yes **No**
4. Did you, your spouse, or any dependents receive health insurance through a federal or state exchange (aka ObamaCare) in 2023? If you have Medicare, TennCare, Medicaid, or insurance from employers and no other health insurance, then check "No."
 Yes **No**
If the answer is "Yes," we will need your Form 1095-A before we can complete your return.
5. At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? **Yes** **No**
6. If you are due an income tax refund and would like the amount direct deposited to or have tax withdrawn from your bank account, please enter the following information:
Routing Number _____ Bank Name _____
Account Number _____ Checking Savings
7. **IF** you can claim mileage for a **BUSINESS, RENTAL, FARM, OR PARTNERSHIP**, please use our business expense worksheet. **NOTE: Unreimbursed Employee Expenses are no longer deductible.**
8. Answer the following **only IF** you had a **business, rental property, or farm**:
 - a. Did you make any payment in 2023 that would require you to file Form(s) 1099? Y N
 - b. If "Yes," did you or will you file the required Forms 1099? Y NFor more information about 1099 filing requirements and penalties, visit www.mefcpas.com.
9. Other items to discuss: _____

For DROP OFF please circle who you would like to prepare your return:

Ramona Elkins Rob Feldman Lisa Bishop Madison Warner First Available

Please present your driver's license or state ID to the receptionist.