



# ABBATE DEMARINIS, LLP

## QUESTIONNAIRE FOR 2023 TAXES

**Name:**

**Telephone Number:**

**Email:**

**1. Did you pay estimated taxes?**

If so, provide dates and amounts paid

**2. Did you make any IRA or Traditional Roth Contributions for 2023?**

If so, please provide amount and type

**3. Do you contribute to or distribute from a NY 529 or similar plan (College Funds)?**

If so, make sure to include your statement

**4. Do you have children in college?**

If so, provide the 1098-T

**5. Do you have long-term care?**

If so, provide the amount paid (if married provide amounts paid separately)

**6. Did you collect unemployment during 2023?**

If so, please provide 1099-G (from NYS website, it is not mailed)

**7. Did you have any changes to your family? (Married, divorced, new children)**

If so, please provide details

**8. Do you have any children under 13 that you pay for childcare?**

If so, provide Name and Tax ID of Facility & Amount Paid

**9. Did you have any residential changes: (Move, Buy, Sell, or Refi)**

If so, please provide details (Closing Statement)

**10. Did you make any energy efficient updates to your home?**

If so, please provide details (HVAC, roof, windows, doors, hot water heater)

Please separate cost/ install amounts

**11. At any time during 2023 did you sell any virtual currency (Coinbase/Robinhood)?**

If any virtual currency was sold, please provide statement

**12. Do you want direct deposit of a refund or auto withdrawal of taxes due?**

If so, please provide bank account number and routing number

**OTHER ITEMS TO INCLUDE WITH YOUR DOCUMENTS:**

Copy of driver's licenses (front and back)

Real Estate taxes

Star rebate amount

Mail, Email or Pickup

Password Protect, Encrypt or no security