

Print Name(s): _____ Date: _____

**These questions pertain to calendar year 2022, unless otherwise noted.
If married filing jointly, the questions apply to you and your spouse.**

Yes No

- 1. Did you, your spouse, or dependents have health insurance through the Health Insurance Marketplace? You can purchase health insurance through the Marketplace or even through a broker. If yes, you must provide 2022 Form 1095-A Health Insurance Marketplace Statement.
- 2. Did you incur any dependent childcare expenses in 2022? If yes, please provide childcare expense statements.
- 3. Did you pay tuition costs for yourself or a family member in 2022 (even if classes were attended in another year)? If yes, you must provide 1098-T and related financial transcripts.
- 4. Did you trade goods, services, etc. in exchange for other goods, services, etc., rather than for money? i.e. Barter
- 5. Did you receive any payments or material from anyone for providing services?
- 6. Did you pay or receive alimony?
Circle one: Pay or Receive Amount \$ _____
- 7. Do you own any securities (stocks, bonds) or hold any debts that became worthless during 2022?
- 8. Did you have any debts canceled or reduced (credit cards, car loans, mortgage debt, etc.), property repossessed or foreclosed upon, or did you file bankruptcy in 2022? You may need to provide Form 1099-C.
If yes, please explain _____
- 9. Did you (or do you plan to before April 15, 2023) contribute to a traditional IRA or Roth IRA for 2022?
- 10. Did you start/have a business or purchase any rental property during 2022?
- 11. Did you pay any individual \$2,400 or more to perform household services during 2022, such as a babysitter, caretaker, housekeeper, cook, gardener, etc. ?

TURN OVER

The IRS **requires** every taxpayer to answer "Yes" or "No" to the question on the back of this page.



Before answering “Yes” or “No” to the question below, we have provided clarifying information regarding digital assets/virtual currency/cryptocurrency.

Digital assets are any digital representations of value that are recorded on a cryptographically secured distributed ledger or any similar technology. For example, digital assets include non-fungible tokens (NFTs) and virtual currencies, such as cryptocurrencies and stablecoins. If a particular asset has the characteristics of a digital asset, it will be treated as a digital asset for federal income tax purposes.

Check the “Yes” box next to the question on digital assets if at any time during 2022, you (a) received (as a reward, award, or payment for property or services); or (b) sold, exchanged, gifted, or otherwise disposed of a digital asset (or any financial interest in any digital asset).

For example, check “Yes” if at any time during 2022 you:

- Received digital assets as payment for property or services provided;
- Received digital assets as a result of a reward or award;
- Received new digital assets as a result of mining, staking, and similar activities;
- Received digital assets as a result of a hard fork;
- Disposed of digital assets in exchange for property or services;
- Disposed of a digital asset in exchange or trade for another digital asset;
- Sold a digital asset;
- Transferred digital assets for free (without receiving any consideration) as a bona fide gift; or.
- Otherwise disposed of any other financial interest in a digital asset.

You have a financial interest in a digital asset if you are the owner of record of a digital asset, or have an ownership stake in an account that holds one or more digital assets, including the rights and obligations to acquire a financial interest, or you own a wallet that holds digital assets. The following actions or transactions in 2022, alone, generally don’t require you to check “Yes”:

- Holding a digital asset in a wallet or account;
- Transferring a digital asset from one wallet or account you own or control to another wallet or account that you own or control; or
- Purchasing digital assets using U.S. or other real currency, including through the use of electronic platforms such as PayPal and Venmo.

Do not leave the question unanswered. The IRS requires every taxpayer to answer “Yes” or “No” on Form 1040.

	YES	NO
1. At any time during 2022, did you or your spouse: a) receive (as a reward, award, or payment for property or services); or b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?		
2. At any time during 2022, did your dependent: a) receive (as a reward, award, or payment for property or services); or b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?		