

Best Enterprises, Inc.

2022 Questionnaire

To help us prepare your 2022 tax returns please complete this questionnaire. Please use the other side of this page for additional notes.

Personal Information

NAME: _____

Yes No

- Did your marital status change in 2022? Explain.
- Did you change jobs in the current tax year?
- Did you have any children, adopt a child or claim new dependents in 2022? Explain.
- Did you buy or sell a house in 2022? Explain. Provide any change of address
- Did you receive social security benefits in 2022?
- ***Please provide a copy of a voided check for direct deposit purposes***

Income Related to Business

- Are you a self-employed individual? Did you receive a 1099-MISC or 1099-NEC form? If so, provide
- Do you own rental property? Provide statement of income & expenses
- Please provide business mileage for 2022 (January -June 2022) (July-December 2022)

Deductions

- Were you covered by health insurance through the Affordable Care Act in 2022? If so, provide Form 1095-A
- Did you have any tuition expenses? If so, provide Form 1098-T
- Did you contribute to any 529 college savings plans? Provide statements
- Did you pay premiums for Long Term Care insurance? Provide statement

Miscellaneous

- Do you own any foreign bank accounts or foreign property?
- Did you receive, sell or trade any virtual currency in 2022? (Bitcoin, Crypto, etc.)
- Did you receive funds via CashApp, Venmo, Zelle or PayPal, etc.? Provide Form 1099-K

Tax Payments

- Did you make any 2022 estimated tax payments? Provide dates & amounts
- Did you receive Virginia income tax rebate in 2022? If so how much?

How will you pay any taxes you may owe – auto-debit, check or other method?

Retirement & Tax Planning for 2023

- Did you contribute to a retirement plan (401K, IRA, SEP, SIMPLE, Qualified Plan, etc.) in 2022?
- Are you considering selling any investments and/or stocks in the coming year - 2023?
- Will you receive social security benefits in 2023?