B. Johnson & Assoc., Ltd.
CERTIFIED PUBLIC ACCOUNTANTS

416 S 6th St, Ste 200
Brainerd, MN 56401

Phone - (218) 829-3501

Individual Income Tax Questionnaire

Credits: see page 4 for required documentation

I (We) assure you that the information provided in this form, along with any other information sheets provided for preparation of my (our) income tax returns is correct to the best of my (our) knowledge and belief. I (We) understand that payment for your services is due upon receipt of my (our) tax returns.

_______________ Signature _______________ Signature _______________ Date

Taxpayer(s)	Social Security #	Occupation	Date of Birth
Name(s) ________	- -	________	________
________	- -	________	________
Address: Street	City	State	Zip

If you have any refunds and you would like them to be direct deposited to your account, please provide :

________ Voided check (for checking account)
________ Deposit Slip (for savings account)
________ **Same as your 2021 tax return**

Home Phone ________
Work Phone ________
Cell Phone ________
Fax ________
E-Mail ________
E-Mail ________

Did you or do you plan to make IRA contributions for this year? Yes____No____

Contributor	Type of Account (Traditional, Roth, Educ.)	Dates	Amounts

Did you have an interest in or a signature authority over a financial account in a foreign country? Yes____No____
If Yes : Name of country____________
Did you pay $2,400 or more to any one household employee this year? Yes____No____
Do you want to designate $3 to the federal presidential election campaign fund? Yes____No____ Yes____No____
Do you want to designate $5 to the state elections campaign fund? Yes____No____ Yes____No____
Your choice(s) of political party? ________ ________

Did you have a theft or casualty loss over 10% of your gross income after insurance proceeds? Yes____No____
If yes, please explain : ____________
Did you make gifts of more than $16,000 to any one individual during the year? Yes____No____
If yes, please explain : ____________
Did you receive correspondence from the State or the IRS during the year? Yes____No____
If yes, please explain : ____________

If you want to donate to the Minnesota Nongame Wildlife fund, fill in the amount
Income Tax Return $________
Property Tax Return $________

Do you foresee any significant changes to your financial situation that will affect your tax liability for 2023? If so, please explain briefly : ____________

Property Tax Refund: If you want us to prepare your Minnesota renter or homeowner property tax refund return Form M-1PR, you need to provide us with your 2022 Certificate of Rent Paid or your 2023 Statement of Property Taxes Due. There is an additional fee for this service.

We will notify you by mail when your tax returns are completed. Please let us know if your mailing address is different from the address above. ____________

Wage and Salary Income

(Attach All W-2's Received)

Employer	Gross Wages (Box 1)	Federal Tax	State Tax

Retirement Income

(Attach All 1099's Received)

Payor	Gross Distribution	Taxable Distribution	Federal Tax	State Tax
Social Security ……………………………………………………				
Social Security ……………………………………………………				
Railroad Retirement ………………………………………………				
IRA's………………………………………………………………..				
Pensions……………………………………………………….				

Interest Income

(Attach All 1099's Received Including All Tax-Exempt Interest Received)

(If Interest is Received on a Contract For Deed, The Payor's Name, Address and Social Security # are Required)

Payor	Amount	Payor	Amount

Dividend Income

(Attach All 1099's Received Including All Tax-Exempt Dividends)

Payor	Dividends	Qualified Dividends	Capital Gains	Tax Exempt	Foreign Tax

Miscellaneous Income

(Attach Relevant Forms)

Unemployment Compensation…………..		Estates or Trusts……………………………….….	
Alimony………………………………………		Royalties……………………………………….….......	
VA Pension……………………………………		Welfare Assistance………………………………	
VA Disability…………………………………		Partnership or S-Corp (Provide K-1)……….….	
Tips and Gratuities………………………..		Lawsuit Recoveries……………………..………..	
Directors Fees………………………………		Cancellation of Debt………………………………	
Prizes and Awards……………………………		Other (Describe) :	
Workers' Compensation……………………			

Security and Real Estate Sales

(Foreclosures, Abandonments, Ponzi Scheme Losses and Other Property Transactions Need to be Listed Here)

Description	Date Acquired	Date Sold	Sales Price	Cost	Expenses

Medical and Dental Expenses

Medical Insurance………...……..………… ______
Medicare Insurance……………...………..…. ______
Long Term Care Insurance……..…Taxpayer ______
Spouse ______
Name of Company ______
Policy # (s): ______
Prescription Drugs………...…...…...……….. ______
Glasses and Contacts………..……......…… ______
Hearing Aids…………………….…..…….….... ______
Doctors, Dentists, Hospitals and Clinics : ______

HSA Contributions……………………………. ______

Ambulance…………………………….…. ______
Medical Transportation:
Mileage ______miles @ $ .18 (1/1-6/30)
______miles @ $ .22 (7/1-12/31) ______
Parking, Bus, Taxi……………………..….. ______
Motels………………………………….…… ______
Other Expenses (Describe) :

Less HSA Reimbursements
included above………….…………...…… ( )
Less Insurance Reimbursements
included above…………..…………...…… ( )

Interest Paid

	Financial Institution	Amount Paid
Deductible Home Mortgage:		
Interest Paid to Banks and Other Financial Institutions :		
List All Mortgages and Equity Loans		
(Attach All 1098 Forms Received)		
Deductible Mortgage Insurance:		
(Only Applies to New Mortgages)		
Points Paid on Purchase or Refinance of Mortgage Loans :		
(Include Copy of Settlement Statement)		

Interest Paid to Individuals on a Contract For Deed : (Payee's Name, Address and Social Security # must be included; failure to provide is subject to a fine)
Name………………………………….………….………. ______
Address…………………………………...…….………..... ______
Social Security #.....…………….………...….………..….. ______

Investment Interest :

Investment Loan Relates to :	Interest Paid to	Amount Paid
Brokerage Margin Account:		
Other (Describe)		

Student Loan Interest :
Student's Name…………………………....………..……… ______
Interest Paid (Attach 1098-E Forms)……………...……….. ______

Contributions

Only amounts given to qualified charitable organizations qualify. Examples of NON-DEDUCTIBLE amounts are to political organizations and candidates, dues and fees paid to lodges and fraternal orders, raffles, bingo, and pull tabs.
Please list all of your qualified charitable gifts here as you may receive a deduction even if you do not itemize deductions.

Cash Contributions :

Religious Organizations..………………………. ______
Schools…………………….……….…..………….. ______
United Way…………………………..….……… ______
Boy Scouts / Girl Scouts……..…………..……. ______
Other (Please list) :

Volunteer Mileage : ______miles @$ .14 ______

Non-Cash Contributions:

1) Complete the worksheet included with your organizer.
2) You must have a receipt stating the amount received by the organization from the sale of a donated vehicle, boat, etc.

If TOTAL Non-Cash Contributions are:
Less than $250: Receipt not required if impractical.
Document donations with written description.

More than $250: Receipts required.

The IRS requires proof for ALL cash contributions to qualified charitable organizations.
(receipt, cancelled check, bank statement, credit card statement, etc.)

Taxes Paid

Auto Licenses : List separately

(Describe) : ______________________ ________

______________________ ________

______________________ ________

Real Estate Taxes :

Home……………………..…..… ________

M-1PR Refund Received…… (   )

Second Home/Cabin………… ________

Land…………………….……….. ________

______________________ ________

______________________ ________

______________________ ________

Sales Tax - on these major purchases: vehicle, boat, home building materials, etc.

______________________ ________

______________________ ________

Income Taxes :

	Date Paid	Federal	State
Prior Years Refunds Received…………………………………………………………….			
Prior Years Additional Payments…………………………………………………………			
Estimated Tax Payments:			
Prior Year 4th Installment Due January 15, 2021……………………………………			
1st Installment Due April 15, 2022………………………………………………………			
2nd Installment Due June 15, 2022………………………………………………………			
3rd Installment Due September 15, 2022…………………………………………………			
4th Installment Due January 15, 2022…………………………………………………			

Other Deductions

Alimony Paid…………………………………… ________

Name and Social Security # of Recipient

____

Work or Job Related Expenses :

Union and Professional Dues…..…….. ________

Work Supplies……………………..……. ________

Tools and Safety Equipment………..… ________

Required Uniforms and Laundry……… ________

Trade Journals and Subscriptions……. ________

Your Continuing Education :

(Enter information for your dependents education on the dependent questionnaire)

Tuition and Fees………..……..……. ________

Books and Supplies…..……..……..… ________

Travel or Miles @ $ .58.5 (1/1-6/30)……… ________

Miles @ $ .62.5 (7/1-12/31)……. ________

Tax Preparation Fee………..……………...……. ________

Safe Deposit Box……………….………..……..…. ________

Investment Fees and Expenses………..………….. ________

IRA Maintenance Fees…………………..…..….… ________

Adoption Expenses……………………..…..……... ________

Explain __________________________

Moving Expenses (military active duty)…………..… ________

Explain __________________________

Mileage:

________ miles @ $ .18 (1/1-6/30)

________ miles @ $ .22 (7/1-12/31)

____

Job Hunting Expenses………………………………………………… ________

Other Items (Describe) :

______________________________ ________

______________________________ ________

______________________________ ________

______________________________ ________

______________________________ ________

If you have expenses for business, work, or farm use of your personal automobile, fill in the required information on the separate information questionnaires.

Please bring the following documents with your information:

W-2 Forms for Wages and Gambling Winnings.
1099 Forms for Interest, Dividends, Stock Transactions, Real Estate Sales, and Miscellaneous Income.
1099 Forms for Pension and IRA Distributions.
1099 Forms for Unemployment Compensation Received.
K-1 Forms for Partnerships, S-Corporations, Estates and Trusts.
1098 Forms for Interest Paid on Mortgages.
1098-E Forms for Interest Paid on Student Loans.
1098-T Forms for Tuition Payments.
1099-C Forms for Cancellation of Debt.
SSA-1099 Forms for Social Security Benefits Received.
RRB-1099 Forms for Railroad Retirement Benefits received.
Real Estate Sales / Purchases Closing Statements.
Contract For Deed - Name, Address, and Social Security # Information.
Refinancing Loan Closing Statements.
Any Tax Notices from the Internal Revenue Service or Minnesota Department of Revenue.

Credits:
Mortgage Interest Credit:
Mortgage Interest Certificate.
Child & Dependent Care Credit:
Qualifying Expenses.
Education Credits:
Forms 1098-T and Cost of Books and Supplies.
Solar, Wind & Geothermal Energy:
Receipts for Qualified Property.
Adoption Credit:
Receipts for Qualified Expenses.
Energy Credits:
Receipts for Energy Efficient Costs.

Payment for tax preparation is expected at the time your returns are filed. All unpaid balances are subject to a 1 1/2% per month (18% annual rate) service charge.