

HANTZ FAMILY OFFICE TAX QUESTIONNAIRE – TAX YEAR 2022

1. Did you make estimated quarterly tax payments?

No

Yes, provide details

2. Did you buy/sell/exchange cryptocurrency?

No

Buy only

Yes, Provide 1099 and/or detailed excel transaction summary

3. Did you install any energy efficient property on your primary residence?

No

Yes, provide invoice and energy star documentation

4. Did you purchase an electric or plug in hybrid vehicle in 2022?

No

Yes, include the purchase summary with VIN #, date purchased, make and model

5. Did you have a financial interest or signature authority over a foreign bank account?

No

Yes

6. Did you use Health Savings Account (H.S.A) funds to pay qualified medical expenses? (FSA not included)

No

Yes, provide 1099-SA

7. Did you at all during the year have health insurance through the exchange (Healthcare.gov)? If so, please log in to healthcare.gov and print out your 1095-A.

No

Yes

8. Did you pay childcare expenses for your dependent children?

No

Yes, provide year end statement from childcare provider

9. Did you contribute to your state sponsored Qualified Tuition Program/529 (ex. MESP)?

No

Yes, provide 12/31 statement

10. Did you receive unemployment benefits?

No

Yes, provide 1099-G

11. Did you participate in sports betting or online gambling?

No

Yes, provide the 1099 and or W-2G

12. Did you have business mileage associated with your vehicle? If so please break out your mileage detail for 1/1/22 - 6/30/22, and from 7/1/22-12/31/22.

Detail: _____

13. Do you want your refund direct deposited?

No

Yes, provide routing # _____

and last 4 of account # _____

14. Do you want your balance due direct debited?

No

Yes, provide routing # _____

and last 4 of account # _____

Quarter	Federal	State	Local	Date Paid
First				
Second				
Third				
Fourth				
Total				