

How To Fill Out the Tax Questionnaire

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Access the Questionnaire [HERE](#)

Instructions

Can be completed on either desktop or mobile devices

Gather all your information before taking the questionnaire. It will ***not*** save your answers until you submit. Relevant information includes:

- Quarterly Tax Payments
- Cryptocurrency
- Energy Efficient Property/ Electric Vehicles
- Foreign Bank Accounts
- Health Insurance & Children
- Unemployment
- Sports Betting and Gambling
- IRS Identity Protection Pin
- Bank Account information for payments and deposits

Step 1

Select "Begin"

HANTZ TAX & BUSINESS

2023 Hantz Family Office Tax Questionnaire

Please complete all the questions and upload all required documents.

Begin

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Step 2

7% completed

Tell us a couple details about yourself so that we know it's you.

Client Name *

If this name is wrong, please contact your Advisor

Client Email Address *

Do you make estimated quarterly tax payments? *

If so, you will be asked to provide quarterly values for Federal, State and Local payments.

No

Yes

Back

Next

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Enter in your name and email

Select "Next"

* Denotes required information

Step 3

36% completed

CryptoCurrency

Did you buy/sell/exchange cryptocurrency? *

If yes, please provide a 1099 and/or detailed excel transaction summary.

No

Buy only

Yes

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Answer questions for the following sections:

- Quarterly Tax Payments
- Crypto currency
- Foreign Bank Accounts
- Health Insurance & Children
- Unemployment
- Sports Betting and Gambling
- IRS Identity Protection Pin

Select "Next" once each section is complete

Step 4

86% completed

Direct Deposit / Balance Due

Tell us how you want us to do with your refund or balance due.

Do you want your refund direct deposited? *

Yes, same as last year

No

Yes, different bank account

Please confirm the last four of the account number. *

Do you want your balance due direct debited? *

No

Yes, same as last year

Yes, different bank account

Please confirm the last four of the account number. *

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Confirm how you would like refunds and/or balance due paid

Have your bank account information readily available

Select "Next"

Step 5

93% completed

Summary

Please review the information you have entered:

Tell us a couple details about yourself so that we know it's you.

Client Name
Lindsay Test

Client Email Address
lindsay.hurd@hantzgroup.com

Household ID
no response

Do you make estimated quarterly tax payments?
No

Review a summary of your responses

Select "Next" once complete

Next

Step 6

Confirm you agree to electronic confirmation. Select "I Agree" and then "Continue"

Please Review & Act on These Documents

Hantz Financial Services
Hantz Financial Services, Inc.

HANTZFINANCIAL
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Please read the Electronic Record and Signature Disclosure
 I agree to use electronic records and signatures.

CONTINUE OTHER ACTIONS

- Yes, provide 1099 and/or detailed excel transaction summary
 No
3. Did you install any energy efficient property on your primary residence?
 Yes, provide invoice and energy star documentation
 No
4. Did you purchase an electric or plug-in hybrid vehicle in 2023?
 Yes, include the purchase summary with VIN #, date purchased, make and model
 No
5. Did you have a financial interest or signature authority over a foreign bank account?
 No
 Yes, provide maximum values for the year and investment details
6. Did you use Health Savings Account (H.S.A) funds to pay qualified medical expenses? (HSA not included)
 No
 Yes, provide 1099-SA
7. Did you at all during the year have health insurance through the exchange (healthcare.gov)?
 No
 Yes, log in to healthcare.gov and print out your 1095-A
8. Did you pay childcare expenses for your dependent children?
 Yes, provide year end statement from childcare provider
 No
9. Did you contribute to your state sponsored Qualified Tuition Program/529 (ex. MESF)?
 Yes, provide 12/31 statement
 No
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. Do you or your spouse have an IRS Identity Protection PIN?
 No
 Yes, I have a _____ spouse _____ and include IRS letter
13. Do you want your refund direct deposited?
 No
 Yes, please verify your confirm bank of account # _____

By checking this box I am acknowledging I will be providing these documents separately to my tax specialist.

Step 7

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HANTZ FAMILY OFFICE TAX QUESTIONNAIRE – TAX YEAR 2023

Quarter	Federal	State	Local	Date Paid
First				
Second				
Third				
Fourth				
Total				

- Did you make estimated quarterly tax payments?
 No
 Yes, provide details and proof of payments
- Did you buy/sell/exchange cryptocurrency?
 No
 Buy only
 Yes, provide 1099 and/or detailed excel transaction summary
- Did you install any energy efficient property on your primary residence?
 No
 Yes, provide invoice and energy star documentation
- Did you purchase an electric or plug in hybrid vehicle in 2023?
 No
 Yes, include the purchase summary with VIN #, date purchased, make and model
- Did you have a financial interest or signature authority over a foreign bank account?
 No
 Yes, provide maximum values for the year and investment details
- Did you use Health Savings Account (H.S.A) funds to pay qualified medical expenses? (FSA not included)
 No
 Yes, provide 1099-SA
- Did you at all during the year have health insurance through the exchange (Healthcare.gov)?
 No
 Yes, log in to healthcare.gov and print out your 1095-A
- Did you pay childcare expenses for your dependent children?
 No
 Yes, provide year end statement from childcare provider
- Did you contribute to your state sponsored Qualified Tuition Program/529 (ex. MESP)?
 No
 Yes, provide 12/31 statement
- Did you receive unemployment benefits?
 No
 Yes, provide 1099-G
- Did you participate in sports betting or online gambling?
 No
 Yes, provide the 1099 and or W-2G
- Did you or your spouse have an IRS Identity Protection PIN?
 No
 Yes

By checking this box I am acknowledging I will be

You will be taken to a summary page to confirm your inputs

Review the information as your final check

As needed, adjust any of your responses

Step 7

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By checking this box I am acknowledging I will be providing these documents separately to my tax specialist.

Required - Approve - Unchecked
Approve I approve that these answers are correct to the best of my knowledge.

FINISH

Once your final review is complete:

Select “By Checking...”

AND

Select “I Approve...”

Step 8

HANTZ TAX & BUSINESS

Thank you for completing this year's Tax Questionnaire.

Please submit the rest of your tax documents to your Tax Specialist and they will follow up with you to complete your return.

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Tax Questionnaire
is now complete

For any questions, please contact us at
communications@hantzgroup.com or contact your tax specialist

Thank you!