2024 TAX APPOINTMENT & QUESTIONNAIRE (for 2023 Taxes)

Dear che	шι,		
Your tax	appointment for	this year is:	
Day	Date	Time	am∖pm

This document digitally available at mckaytax.com (tools & checklists)



My Office	Mail	Portal	Drop Off	
If you are unab	ole to keep this	appointment da	ate kindly give us as n	nuch advance notice as
possible so tha	t your time car	n be filled by so	meone else.	

OPTIONS FOR SHARING YOUR TAX INFORMATION WITH US IN ORDER TO COMPLETE YOUR TAX RETURN

- Use our secure portal to upload your fillable questionnaire and tax documents to complete your taxes remotely. \$10 discount with completed questionnaire. Please contact us before your appointment date if you choose this option.
- Mail your information to me and I can complete your taxes and mail back to you
- After arriving at your scheduled appointment time call us and we will immediately secure your information and complete your taxes in our office with phone call(s) while you wait in your vehicle.
- Meet with us for your appointment if in our office.

HOW TO ENSURE THAT YOU ARE GETTING THE MAXIMUM POSSIBLE DEDUCTIONS & CREDITS ALLOWED BY LAW:

- Please read and complete the "Information Checklist" (right) and all other parts of the questionnaire that apply before the appointment date.
- Bring a list of all other tax questions to the appointment.

TO OPT OUT OF RECEIVING TEXT MESSAGES PLEASE CONTACT US TAX PREPARATION FEES:

• Minimum fees including state are \$100 or \$90 if filing through the portal (only with a completed questionnaire). Dependents prep fees are minumum \$40. The average fee is usually between \$120 and \$150 but can vary by the number of extra forms and their complexity. See the complete list of form prices at Mckaytax.com

QuickBooks.

Certified <u>ProAdviso</u>r

Desktop

• You may pay with cash, check, Visa, Master Card or Venmo

If you have any questions or need to change your appointment, please call (801) 731-1857. If I am not in the office then please leave a message and I will return your call promptly. Thanks for your business.

Richard V McKay E.A Rebecka P McKay

McKay Tax and Accounting 4431 S 2300 W Roy, UT 84067

Office 801-731-1857 (fax 731-6942) (text 801-540-5290) http://www.mckaytax.com/E-Mail Rmckay@mckaytax.com



www.Mckaytax.com
RV Software Inc.

Please have the following available for our appointment;

- Last years tax return (Only if done by someone else)
- All W-2's, 1099's, k-1's, 1098's
- Records of all other incomes and expenses
- Escrow statements of any property bought, sold or financed
- Health Insurance Form 1095-A if applicable
- State ID (Drivers License)

YES	NO	Unsure	INFORMATION CH	ECKLI	ST				
			Did you have any other sources of income	other than	from the W2s,				
			1099s, K1s, and other income information t	099s, K1s, and other income information that you have presented?					
			t any time during 2023, did you receive, sell, send, exchange or						
			otherwise acquire any financial interest in an	herwise acquire any financial interest in any virtual currency?					
			Has your marital status, address, or depende	ents change	ed last year?				
			Did you support anyone other than your own	n children	or does anyone				
			live with you who is not your dependent?						
			Do you have any losses to carry forward fro	m previou	s years?				
			Did you sell any securities or has any becom	ne worthle	ss during 2023?				
			Did you pay interest on a mobile home, mot	or home,	or boat that has				
			basic living accommodations?						
			Did you buy, sell, or refinance real estate?	Bring Hud	statements.				
			Did you pay for medical insurance that is no						
			Do you use a portion of your home as an of						
			on an ongoing and exclusive basis (Only if you have a small busines)?						
			Do you anticipate any substantial changes in income, deductions, or						
			ax withholding for the coming year?						
			Did you pay higher education expenses for you or your dependent this						
			year? (Tuition, Fees, Books, and interest).	List names	and amounts on				
			page two, section 6 under "Education Credi	ts". Bring	form 1098-T				
			Does anyone owe you money which has bec	ome a bac	l debt? (There				
			must be true debtor/creditor relationship)						
			Last year did you or your spouse purchase health insurar (Obamacare) to help you reduce your monthly health ins						
			Did you make energy efficent improvements to your hon	ne or purchas	ed an Electric Auto?				
			Did you receive alimony?	Amount					
			Did you pay alimony SS #	Amount					
			If you contribute to a retirement plan that we	as not a de	duction from you				
			wages then enter below. Information for ret	tirement pl	ans deducted				
			from your wages are accounted for in your v	W2					
			5	Amount					
			Did you contribute to a Roth IRA?	Amount					
			Do you have a health savings account? Brit		099-SA				
			In 2023 did you have interest in a foreign ac	count?					
			Do you use a home equity loan to buy or im		r home? If so				
			please provide principal balances during the year.						

		IN	COME	2023					DI	EDUC	TIONS	2023			
	Section	n 1· PF	RSON4	L INFOR	MATION				Section	7: ME	DICAL	EYDEN	ISES		
	CHECK IF NO PER						YOUR TAXES	Prescription drugs	Jection	I / . IVIL	DICAL		OLO		
If there are no cha	inges it is not necessary to							Health insurance prer	niums /Medic	are					
Full Names(bo	oth)	·						Doctors/Dentists							
Address	,							Hospitals / Emergenc	y Care/X-ray/	Lab					
Home Phone		Work Pho	ne		email			Medical equipment	, - · <u>, ·</u>						
	Soc. Sec. Number		Occupati	on	Cell P	hone	Date of Birth	Glasses / Contacts /H	earing Aids						
You								Medical Miles (22¢)							
Spouse								Reimbursements for a	amounts abov	е		Cafeteria	Plan Pay	ments	
													·		
	S	ection 2	: DRIVE	ERS LICE	NSE			Section	on 8: TAX	ES (Uta	ah car f	ees no	t dedu	ctible)	
	License nu	m	State	Issue da	ite	Exp	iration Date	State Tax Paid with 20					ate Resid		
You Spouse					-			Sales Tax on Auto,Tr Auto/Truck county tax					ate Tax La al Estate	and	
Spouse				l .	ı			Auto/Truck county tax	(INOT Valid II	i Utari)		Other Re	ai Estate		
Sectio	n 3: DEPENDEN	ITS		PLEASE LIST	TALL BIRTI	H DATES	& INCOME		Sect	ion 9: I	NTERE	ST PA	ID		
	ull Name	Relation-		Income	Social S		Months lived	Mortgage Interest (1s	i, or 2nd to im	prove HN	(Investme		
	un realite	Ship	Birth	meome	Num	ber	in home 2023	Mortgage Interest (1s			1			-	for buying or
								Mortgage Insurance (ist/zna to imp	prove nivi	/		li li	nproving l	nome
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										on 10: (CONTR	IRALIC	N2	l	
								Donee	Amount:		Donee			Amount	
								Donee Donee	Amount: Amount:		Donee Donee			Amount Amount	
				<u> </u>				Charitable Miles (14¢)		1	Donee		I	Amount	1
								Donated Property Des			l				<u>I</u>
	TOTAL HOUSE	HOLDE	RESIDE	NTS IN 20	123			Cost	оправи						
	TOTAL HOUSE		(LOIDE	ITTO IIT E				Fair Market Value							
	Section 4: ALI	INTER	EST AN	ID DIVIDE	NDS R	CEIV	ED								
Interest Source			ount		nd Source	QU		Section 1	1: EDUCAT	TION CE	REDITS	(must h	nave for	m 1098	3-T)
mitoroot oour	,,,					- 40	, anount				ge year				Loan
								Student Name			ph,Jr,Sr	Tuitio	n/ Fees/	books	Interest
											• • •				
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									Section 1						
									d/Dependent	Care Exp					
	0	- 0415	OF OT	001/0/0		IEO.		Care Provi	der		Address		S.S.#	#/E.I.#	Amt. Paid
Б				OCKS / S			Calling Dries	۹ ا							ļ
יט	escription	Date A	cquirea	Date Sold	COSI/ Da	1515	Selling Price	┥┝───							
								┪┢───							
						-		Employer Provided	Child Care P	avmente	(Cafeteria	Plan)			<u> </u>
									Jima Gaig F	2311101110	Caletelle	iaii <i>)</i>			
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		So oti o m	C. OTH	ED INGG	ME			det Ouerten Dete	Section	тэ. ЕЗ І	IMATED				
Ctate toward		section	6: UTH	ER INCO		tod sales		1st Quarter Date				ter Amou			
	ds received in 2023 t compensation - bring	ctatement		Tips receive Hobby incor		ied only)		2nd Quarter Date 3rd Quarter Date			2nd Qua	rter Amo rter Amou			
_ ,	/RR Tier 1 - bring stat					ard damb	l bling) bring info	4th Quarter Date			4th Qua				
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BUSINESS INCOME and EXPENSES 2023

Section 14: SELF EMPLOYED INCOME/EXPENSES									
Product or Service									
Did you actively participate in the	business this	s year		YES		NO			
Did you file a Schedule C for this	business bef	ore		YES	1	NO			
Gross Income				Returns					
Beginning Inventory				Purchases					
Personal Use Items				Ending Inventory					
Advertising			Rent(othe	er)					
Bad Debts			Repairs/M	/laint.	i				
Bank Charges			Supplies		l				
Commissions/fees			Taxes/Lic	ense					
Cleaning			Travel		ī				
Depletion			Meals		i				
Dues/Publications			Medical In	ns.					
Employee Benefits			Utilities						
Insurance			Wages						
Business Interest			Job Credi	it					
Interest(mortgage)			Other:						
Legal/Professional			Other:						
Profit Sharing			Other:		i				
Rent(equip/veh)			Other:		 	_			

Section 15: VEHICLE EXPENSES-EMPLOYEE or SELF EMPLOYED							
	Veh 1 Desc:		Veh 2 Desc:				
Date placed in service							
Total mileage for year							
Business miles for year							
Distance from home to work							
Cost/Fair Market Value on date place in service							
Do you have another personal vehicle(Y/N)			YES	NO			
Do you have written evidence of business miles(Y/N)			YES	NO			

Section 16: VEHICLE ACTUAL EXPENSES (Not required for mileage rate)								
	Vehicle 1 Desc:		Vehicle 2 Desc:					
Gas/Oil/Repairs/Wash								
Tires/Batteries etc								
Insurance/License								
Taxes								
Interest								
Lease Payments								
Other:								

Section 18: OFFICE IN THE HOME SELF EMPLOYED							
Office Square Ft	Home Square Ft						
Home Interest	Home taxes		Heating				
Electricity	Insurance		Rent				
Office Repairs	Office Maint.		Other				

Section 17: RENTAL INCOME/EXPENSES										
Property	Address									
Α										
В										
С										
Did you or a	member of your family use ar	y of these properties								
for personal	purposes for the greater of fo	ourteen(14) days or								
	otal days rented at a fair renta	· , •	YES	NO NO						
	vely participate in the operation			NO NO						
Properties	. , , , , , , , , , , , , , , , , , , ,	Α	В	С						
Income										
Advertising										
Auto/travel										
Cleaning/Ma	intenance									
Commission	ıs									
Insurance										
Legal/Profes										
Mortgage In										
Other Interes	st									
Repairs										
Supplies										
Taxes										
Electricity										
Heat	Heat									
Water/Garbage										
Phone										
Yard Care										
Other:										
Income from I	ncome from Partnershins/S Corn/Estates/Trusts: Attach K-1's									

Section 18: TRANSACTIONS NOT REPORTED ON FORM 1099								
Description	Date Acquired	Date Sold	Receipts	Cost				

	Section 19: SECURITIES AND PROPERTY SOLD								
Description	Date Acquired	Date Sold	Receipts	Cost					

Section 20: ASSETS PURCHASED for BUSINESS/RENTAL									
Description(and which business) Date Purchased Cost									