

2023 Mandatory Questionnaire

You **must** answer all these questions before we can begin working on your return.

- 1 **Minnesota Rebate Payments** – Did you receive the one-time Minnesota Rebate of \$260/person up to \$1,300 payment in Fall 2023? If “yes” provide your 1099-MISC, letter, or other documentation of the payment amount you may have received.

	<u>Yes</u>	<u>No</u>
Taxpayer	_____	_____
Spouse	_____	_____

- 2 **Foreign Transactions** – provide details for any “yes” answer. “Foreign” does not include any foreign investments held in a US-based brokerage account.

	<u>Yes</u>	<u>No</u>
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Did you receive a distribution from, or were you a grantor or transferor to, a foreign trust?

_____	_____
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Did you have a financial interest in, or signature authority over, a financial account such as a bank account, securities account, or brokerage account located in a foreign country?

_____	_____
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Did you have any foreign income or pay any foreign taxes during the year from sources such as a foreign bank accounts, partnerships, or a foreign employer?

_____	_____
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Do you have any foreign financial accounts, foreign financial assets, or hold an interest in a foreign entity?

_____	_____
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- 3 **Virtual Currency** – At any time during 2023, did you receive, sell, send, exchange, or otherwise acquire or dispose of any financial interest in any virtual currency? We must answer this on your tax return. If, yes, provide details with your tax documents.

<u>Yes</u>	<u>No</u>
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- 4 **Health Insurance** – Did you obtain health insurance for yourself or any member of your household through the marketplace (i.e. MN Sure or MN residents)? Please provide Form 1095-A

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- 5 **Extension** – Please check the box below if either of the following Statement(s) are true for you:

- I expect to receive tax documents after March 4th
- I am open to or desire to have my tax return extended to October 15, 2024

_____	_____
_____	_____

Note: unless all tax information is received by March 4th, your return may be extended.