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**Giambalvo, Stalzer & Company**  
*Certified Public Accountants, P.C.*

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To Our Clients:

This questionnaire has been designed to assist you in compiling the necessary information to prepare your 2023 income tax returns. The following pages contain many of the common income tax items, expenses, deductions and credits as well as questions that determine the proper handling of these items. Please indicate the amounts for 2023 in the designated areas; you may add further information as appropriate.

***PLEASE RETURN THIS QUESTIONNAIRE  
 TO THE ABOVE ADDRESS BY:***

***FEBRUARY 29, 2024***

It is essential that we receive your information timely to enable us to process the return in time for you to file by ***APRIL 15, 2024***.

\* \* \* \* \*

**To comply with current Internal Revenue Service regulations governing the preparers of income tax returns, we request you read and sign the following statement:**

*"I (We) have submitted to you all of the required information to be used in the preparation of my (our) 2023 personal income tax returns and I (we) have the necessary documentation to substantiate the income and deductions claimed, including all record keeping required for travel, entertainment, charitable contributions and auto expenses, if applicable. I (We) understand you will not audit or otherwise verify the data submitted. I (We) also understand the fee charged is based upon the amount of time required at standard rates for tax work and is due and payable upon presentation of your invoice."*

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

**<<<<<Please visit our web site at: [WWW.GSCO-CPAS.COM](http://WWW.GSCO-CPAS.COM)>>>>>**

**2023**

**INCOME TAX INFORMATION**

**2023**

	Taxpayer (You)	Taxpayer (Spouse)
Name		
Social Security Number		
Occupation		
Date of Birth		
Home Address	Street:	
"X" if address has changed ( )	Town:	State: Zip Code:
Telephone Number	Home: ( )	Cell: ( )
"X" if number has changed ( )	Business: ( )	Fax: ( )
Driver's License: State and Number		
Date of Issue and Date of Expiration		
NYS Driver's License Document #		
Current e-mail address		

CHILDREN AND OTHER DEPENDENTS						
Name (First and Last)	Social Security Number	Date of Birth	Relationship	Gross Income	College Student?	College 529 Plan?

NOTE: For Child Care Credit, please provide Name, Address, Identification Number and amount paid to each provider (if applicable)

**WAGES AND SALARIES**  
 <<< PLEASE ATTACH ALL COPIES OF ALL W-2 FORMS >>>

**INTEREST AND DIVIDEND INCOME**

ATTACH ALL FORMS 1099 you received from Banks, Credit Union, Notes, U.S. Savings Bonds, Private Mortgages, investments in Corporations, etc. List any interest or dividends for which a Form 1099 was not received. (For seller financed mortgages on personal residences, provide the name, address and Social Security Number of the payor.)

ESTIMATED INCOME TAX AND SOCIAL SECURITY DATA							
	Due Date	FEDERAL		STATE _____		CITY _____	
		Date Paid Mo/Day/Yr	Amount	Date Paid Mo/Day/Yr	Amount	Date Paid Mo/Day/Yr	Amount
Credit from 2022			\$		\$		\$
1st installment	4/18/2023		\$		\$		\$
2nd installment	6/15/2023		\$		\$		\$
3rd installment	9/15/2023		\$		\$		\$
4th installment	1/16/2024		\$		\$		\$
Totals			\$		\$		\$

<b>Social Security:</b> Total Benefits received for 2023 (Attach Form(s) 1099-SSA)	You:	\$
	Spouse:	\$





