

1-2-3 Checklist

All questions are related to tax year 2023 unless otherwise indicated

Your name(s)

- YES NO Did you make any out of state purchases on which you did not pay sales tax?
If yes, please enter state sales tax on Sheet 1, second page.
- YES NO Were adjustments made **by the IRS or any state** to any prior 3 years' income tax returns?
- YES NO Will your income change significantly in 2024 Up Down
- YES NO Will your marital status change in 2024?
- YES NO Are you claimed as a dependent by your parents or anyone else?
- YES NO Did you have any new dependents?
- YES NO Are any of the dependents listed on last year's return no longer your dependents?
- YES NO Did you pay more than half the cost of supporting a parent?
- YES NO Did you have any sales or other exchanges of virtual currencies?
- YES NO Did you receive a distribution (1099-R) from a qualified employer plan Keogh IRA or 529. check all that apply
- YES NO Did you inherit an IRA?
- YES NO If yes, did you rollover the distribution to an IRA? within 60 days? (see 1099-R Organizer)
- YES NO If eligible, would you like to make a contribution to an: IRA Roth IRA SEP IRA 529
- YES NO Did you convert a traditional IRA to a Roth IRA?
- YES NO Did you buy sell stocks / bonds / mutual funds (not IRA, 401(k), etc.)? If sold attach 1099-B
- YES NO Did you receive, sell, exchange, gift, or otherwise dispose any financial interest in any digital asset?
- YES NO Did you buy sell your home (1099-S)? If so, provide us with closing statements for purchase and sale.
- YES NO Did you refinance your mortgage or take an equity loan on your 1st or 2nd home? If yes provide statement.
- YES NO Did you borrow money to make an investment? If yes, please explain.
- YES NO Did you make any loans that became uncollectible last year? Did you try to collect?
- YES NO Did you give / receive any gifts of over \$16,000 to any individual? Transferred / received Real Estate?
- YES NO Has anyone in your immediate family passed away this or last year? Relationship to you
- YES NO Do you have a will? If no, we recommend you make one.
- YES NO If completing sheets #3 or #4 did you adopt a capitalization statement (see our website - Data Organizer)
- YES NO Did you form a corporation, LLC, LLP or partnership?
- YES NO Did you have any income from foreign (non-US) sources, not reported on 1099s? Were any foreign taxes withheld?
- YES NO Did you have foreign (non-US) bank account or any other financial acct? If yes, which country:
- YES NO If yes, did you have income in a foreign (non-US) bank account / investments?
- YES NO Did you have foreign (non-US) bank or financial accounts with over \$10,000 in total at any time during the year?
- YES NO If yes, and you live in United States, was it over \$50,000 (single) or \$100,000?
- YES NO Or if you live abroad, was it over \$200,000 (single) or 400,000?
- YES NO Did you receive a distribution from, or were you the grantor of, or transferor to/from a foreign (non-US) estate/trust?
- YES NO Check yes to allow Juda Kallus to set your e-filing pin to 11111 and if married 22222 for your spouse.
- YES NO Check yes to allow Juda Kallus to discuss this return with the IRS / state if necessary?

Your Tax Return will be automatically uploaded for free to your personal Cyber Cabinet. In addition you may request a copy via email, CD or paper.

Email pdf (password protected)

Paper Tax Return \$40

I will pick it up

Please mail it to me

According to the IRS, you are required to keep records that will enable you to prepare a complete and accurate tax return. Although the law does not require any special form of records, **you must retain all receipts, cancelled checks, bank statements and other evidence** to support amounts claimed as deductions. You must keep your records for as long as their contents may be material in administering any Internal Revenue Law. In most instances, this means 3 years after the date of filing the return.

Please Initial