

Mandatory Questions

Please check the appropriate box and include all necessary details and documentation for any "Yes" answer

	Yes	No
Foreign Transactions - note "Foreign" does NOT include foreign investments held in a US brokerage account		
Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from foreign bank or investment accounts, partnerships or a foreign employer?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive a distribution from , or were you a grantor or transferor to, a foreign trust?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any foreign financial accounts, foreign financial assets, or hold an interest in a foreign entity?	<input type="checkbox"/>	<input type="checkbox"/>
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?	<input type="checkbox"/>	<input type="checkbox"/>

Virtual/Digital Assets (e.g. crypto currency)

I am required to answer these questions on your return

Did you have any sales or other exchanges of digital assets (including from an airdrop or a hard fork)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you use digital assets to pay for goods or services?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive digital assets in payment for goods or service?	<input type="checkbox"/>	<input type="checkbox"/>

Be sure to complete the 2022 Client Organizer Checklist on the reverse side of this sheet

**Please also complete the 2022 Tax Organizer available on my website
www.jodeepaape.com**

or

**Paper copies available at the office
100 BridgePoint Drive #120
South St Paul**