

Mandatory Questions

Your return will NOT be completed until this form has been returned

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

	<u>YES</u>	<u>NO</u>
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? (Not including US brokerage or other stock accounts - e.g. Computershare)	_____	_____
Did you receive a distribution from, or were you a grantor or transferor to, a foreign trust?	_____	_____
Did you have any foreign financial accounts, foreign financial assets, or hold an interest in a foreign entity?	_____	_____
Did you have a financial interest in, or signature authority over, a financial account such as a bank account, securities account, or brokerage account <u>located in a foreign country</u> ?	_____	_____
Virtual/Digital Assets (e.g. crypto currency). I am <u>required</u> to answer these questions on your tax return,		
Did you sell, exchange or otherwise dispose of a digital asset (or a financial interest in a digital asset)? This includes income from an airdrop or a hard fork.	_____	_____
Did you receive digital assets as reward, award or payment for goods or services?	_____	_____

Be sure to complete the 2023 Client Organizer Checklist (blue sheet)

Please also complete the 2023 Tax Organizer included with this packet and available as a fillable pdf on my website.

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