

2023 Tax Compliance

Please check an option for each question below, sign, & return this form to our office before we complete your tax returns.

Foreign Accounts

A United States person who has a financial interest in or signature authority over a foreign financial account located in a foreign country must file a FinCEN Form 114 (FBAR) with the US Treasury if the total of all foreign accounts exceeds \$10,000 at any time during the calendar year.

In addition, individuals who hold any interest in “specified foreign financial assets” (SFFAs) during the year must attach to their 2023 individual tax return Form 8938 including information with respect to each SFFA if the total value of the interests exceed \$50,000.

_____ YES, I do have the above described foreign accounts. I will provide the required information to prepare the appropriate tax filings.

_____ NO, I do not have the above described foreign accounts.

Digital Assets

At any time during 2023, did you (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (Crypto Currency etc.)

_____ YES, I will provide the required information to prepare the appropriate tax filings.

_____ NO, I did none of the above related to digital assets.

Taxpayer

Printed Name

Spouse

Printed Name

Date