

**Alpine Summit CPAs  
2023 Tax Information Sheet**

<b>Client Info</b>	
Taxpayer Name	
Taxpayer Email Address	
Spouse Name	
Spouse Email Address	
How would you like to receive your copy?	<input type="checkbox"/> Paper Copy <input type="checkbox"/> Electronic <input type="checkbox"/> Both

<b>Direct Deposit Info</b>	
Change in bank acct from last year?	<input type="checkbox"/> Yes <input type="checkbox"/> No              If yes, please enter below:
Bank Name	
Routing Number	
Account Number	

<b>Other Info</b>	
Did you own, buy, or sell any digital assets/crypto currency?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have an interest in or signature/authority over any foreign accounts in a foreign country?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you receive a distribution from or a grantor/transferor to foreign trust?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total health insurance premiums paid during 2023, if paid out of pocket:	

<b>Federal Estimated Tax Payments</b>	<b>Amount Paid</b>	<b>Date Paid</b>
Q1- Due 04/15/23		
Q2- Due 06/15/23		
Q3- Due 09/15/23		
Q4- Due 01/15/24		

<b>State Estimated Tax Payments</b>	<b>Amount Paid</b>	<b>Date Paid</b>
Q1- Due 04/15/23		
Q2- Due 06/15/23		
Q3- Due 09/15/23		
Q4- Due 01/15/24		