

**Appendix A State Questionnaire**  
**2023 Indiana State income Tax Return Electronic Filing Questionnaire**

**Residency Information**

1. What Indiana County did you live in on Jan. 1, 2023? \_\_\_\_\_
2. What Indiana County did you work in on Jan. 1, 2023? \_\_\_\_\_
3. What Indiana County did your spouse live in on Jan. 1, 2023? \_\_\_\_\_
4. What Indiana County did your spouse work in on Jan. 1, 2023? \_\_\_\_\_

**Indiana Deduction Information**

5. Did you rent your home in 2023? Yes \_\_\_\* No \_\_\_

\*If yes, answer the following questions:

- How much rent did you pay per month? \$ \_\_\_\_\_
- How many months during 2023 did you pay rent \_\_\_\_\_
- Landlord's Name/Address (if different from tax return)  
\_\_\_\_\_  
\_\_\_\_\_

6. Did you own/are buying your Indiana home in 2023 Yes \_\_\_\* No \_\_\_

\*If yes, answer the following question:

- What was the amount of property taxes paid? \$ \_\_\_\_\_

7. Did you make a repayment in 2023 of any income that was reported taxable in a previous year?

Yes \_\_\_\* No \_\_\_

\*If yes, answer the following question:

- What was the amount of the 2023 repayment? \$ \_\_\_\_\_

**Miscellaneous Income Information**

8. Did you receive military pay? Yes \_\_\_\* No \_\_\_

\*If yes, answer the following questions:

- Were you receiving Active Duty (AD), Retirement (R), or Survivor's Benefits (SB) pay?

AD \_\_\_ R \_\_\_ SB \_\_\_

- Are you a surviving spouse and received military retirement pay during 2023?

Yes \_\_\_ No \_\_\_

9. Were you a member of a military reserve component of the Indiana National Guard?

Yes \_\_\_\* No \_\_\_

\*If yes, answer the following questions:

- Were you deployed or mobilized for full service during 2023? Yes \_\_\_ Date? \_\_\_\_\_
- Was your Indiana National Guard unit federalized in 2023? Yes \_\_\_ Date? \_\_\_\_\_

**Refund Information**

10. If you are getting a refund, would you like it be direct deposited? Yes \_\_\_\* No \_\_\_

\*If yes, will any of your refund go to an account outside of the United States?

Yes \_\_\_ No \_\_\_

## TAX DOCUMENT CHECKLIST

Document Name	Description
<b>Form 13614-C</b>	<b>Intake Form</b> ; Must be filled in completely & <b>Signed</b> (back/page 4)
<b>Form 14446</b>	Virtual/Taxpayer Consent to Drop Off, <b>Sign page 3</b>
<b>Driver's License or State ID</b>	<b>Drivers' License &amp; IU Health Badge (if not a member)</b>
Social Security Card(s)	Copies of taxpayer/spouse & all dependents included on Form 13614-C
W-2	For every job held in 2023
1099-R	Retirement account income
SSA-1099	Social Security Income
1099-INT	Interest, or Bank Statement showing YTD Interest or Dividends
1099-NEC	Non-Employee Compensation
1099-G (Box 1)	Unemployment Compensation
1099-G (Box 2)	State or Local Tax Refund
Form W2-G	Gambling winnings/losses
1099-MISC	Other Compensation
1099-B	Capital Gains
1095-A	Health Insurance Marketplace Statement
1099-SA	Distribution from H.S.A.
5498-SA	Contributions/Fair Market Value for H.S.A.
1098-T	Tuition Statement
1098-E	Student Loan Interest Statement
1098	Mortgage Interest Statement & Property Taxes paid
-	University/College Statement of Account
-	Childcare/Day Care Statement
IP PIN	Identity Protection PIN (if applicable)

**FHFCU will NOT process a tax return for anyone opening an account in 2024. (NO EXCEPTIONS)**