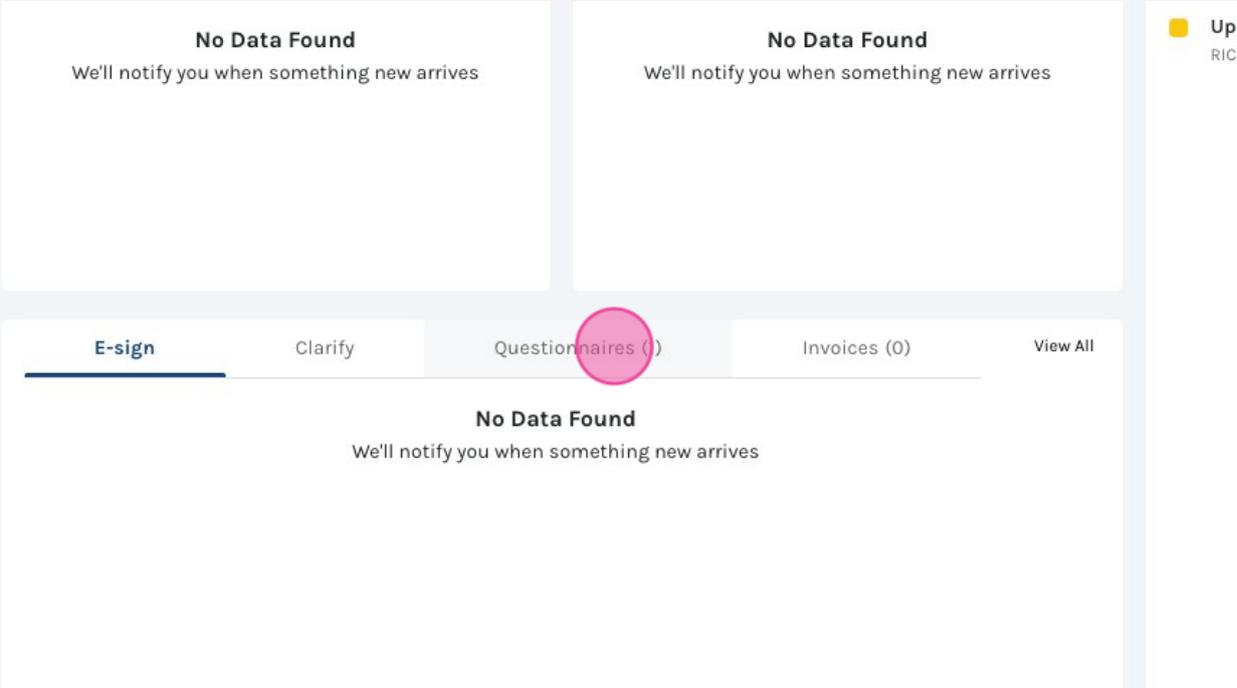


Tax Organizer Submission Via Qount

1 Navigate to <https://rickhoff.qount.io/home-dashboard>

2 Click "Questionnaires"



3 In this tab you will see any questionnaires that you need to fill out.

The screenshot shows a mobile application interface. On the left is a dark blue sidebar with a list of menu items: "Letters", "es", "SON", and "Messages". There are red notification badges with the number "1" next to "es" and "Messages". A white minus sign icon is at the bottom of the sidebar. The main content area has a white background with a top navigation bar containing four tabs: "E-sign", "Clarify", "Questionnaires (1)", and "Invoices (0)". The "Questionnaires (1)" tab is selected and underlined. Below the tabs is a list of questionnaire items. The first item is highlighted with a pink circle and contains the following text:

Questionnaire	1040 Organizer - 2023
Client	RICKHOFF, ALLISON
Answered	0/31

4 Click "# Questionnaires" to navigate to your organizer.

The screenshot shows the same mobile application interface as in the previous step. The dark blue sidebar is now expanded, showing a list of menu items: "# Home", "# Clarify", "# Dashboards", "# Documents", "# Engagement Letters", "# ESignatures", "# Questionnaires", "# Status", and "# To Do's". The "# Questionnaires" item is highlighted with a pink circle and has a red notification badge with the number "1". Below the menu items is a "Messages" section with a white minus sign icon and the text "#RICKHOFF, ALLISON". The main content area has a white background with a top navigation bar containing four tabs: "E-sign", "Clarify", "Questionnaires (1)", and "Recent Docum". The "Questionnaires (1)" tab is selected and underlined. Below the tabs is a list of questionnaire items. The first item is highlighted with a pink circle and contains the following text:

Questionnaire	1040 Organizer - 2023
Client	RICKHOFF, ALLISON
Answered	0/31

5

Click "RICKHOFF, ALLISON
RICKHOFF, ALLISON"

Q < > ORGANIZERS / ASSIGNED

Assigned 1 Submitted 0

Client	Client ID	Questionnaire	Bucket
RICKHOFF, ALLISON	RICKHOFFALL	1040 Organizer - 2023	

RICKHOFF, ALLISON

6

Click the "Sign and Date:" field and start to fill out. Then click the arrow on the bottom to proceed.

Q < > 1040 ORGANIZER - 2023

Tax Organizer Additional Income/Deductions Dependents Foreign Financial & Asset Information Health Care Co

1. Please review the attached engagement letter. Once you have reviewed the letter please sign and date below confirming you understand and accept the terms of our engagement. This step is required before we can begin to prepare your tax return.
2023 Engagement Letter.pdf
Sign and Date:
2. We have done our best to simplify this organizer from last year. We do ask that you review and update your personal/contact information to ensure we have the best way to communicate and collaborate.
Content is saved as you go. You may return to complete this questionnaire at any time.
Once you have verified all information and are ready for us to prepare your return, use the "SUBMIT" button on the "Review and Submit" tab to indicate you are done providing content.
Get your tax information to us by March 1st, 2024 and you will be entered for a chance to win a LG 70" 4K UHD AI ThinQ Smart TV!!
3. The information listed below is based on your prior year tax return.
Please attach the applicable documents using the paperclip icon located in the bottom right corner of each

7

Answer the following questions to the best of your ability.

1. Did you have any income items, such as the following, that were not uploaded in the prior section? If yes, please attach those tax documents here. *

- W-2
- 1099-INT
- 1099-DIV
- Brokerage Statement (Consolidated 1099)
- 1099-R
- SSA-1099
- W2-G
- 1099-MISC or 1099-NEC
- Schedule K-1

Yes

No

2. Did you have any additional deductions, such as the following, that were not included in the prior section? If yes, please attach those tax documents here. *

- 1098-E (Student Loan Interest paid)
- 1098-T (Tuition paid)
- Medical Expenses
- Real Estate Taxes
- 1098 (Mortgage Interest paid)
- Charitable Contributions

8

Click "attach_file" to attach any documents to the appropriate question. In this case, attach any W2s, 1099s, etc.

Attach File

ch as the following, that were not included in the prior section? *

iere.

9 Continue filling out the organizer.

2. Did you have any additional deductions, such as the following, that were not included in the prior section? If yes, please attach those tax documents here.

- 1098-E (Student Loan Interest paid)
- 1098-T (Tuition paid)
- Medical Expenses
- Real Estate Taxes
- 1098 (Mortgage Interest paid)
- Charitable Contributions

Yes

No

← Save & Proceed →

10 Click here to proceed. Or if you need to come back later you can click "Save & Proceed"

2. Did you have any additional deductions, such as the following, that were not included in the prior section? If yes, please attach those tax documents here.

- 1098-E (Student Loan Interest paid)
- 1098-T (Tuition paid)
- Medical Expenses
- Real Estate Taxes
- 1098 (Mortgage Interest paid)
- Charitable Contributions

← Save & Proceed →

11

Click "Foreign Financial & Asset Information" on the top if you wish to navigate to a different tab.

The screenshot shows a software interface with a horizontal tabbed menu at the top. The tabs are labeled "Actions", "Dependents", "Foreign Financial & Asset Information", and "Health Care Co". The "Foreign Financial & Asset Information" tab is highlighted in light blue and has a pink circle around it. To the right of the tabs are two icons: a hamburger menu icon and a download icon. Below the tabs, there are two form fields. The first field is titled "Did both spouses worked or looked for work?" and has a red asterisk. The second field is titled "Provide SSN/EIN, and amount paid for each child." and also has a red asterisk. Both fields have a paperclip icon and a speech bubble icon at the bottom right.

12

"REVIEW & SUBMIT" is the last tab o the organizer.

The screenshot shows a software interface with a horizontal tabbed menu at the top. The tabs are labeled "Plans", "Estimated Taxes", "Miscellaneous", and "REVIEW & SUBMIT". The "REVIEW & SUBMIT" tab is highlighted in light blue and has a pink circle around it. To the right of the tabs are two icons: a hamburger menu icon and a download icon. In the top right corner, there is a blue circular button with the letters "AR". Below the tabs, there are two form fields. The first field is titled "Did the situation change? If yes, please attach Form 1095-A." and has a red asterisk. The second field is titled "Was the employee full-time for the entire year? This would include employer-provided health insurance, Form 1095-B, or Form 1095-C if available." and has a red asterisk. Below the second field, there is a note: "Responsibility Payment no longer applies. Some states have updated their rules, requiring you to have qualifying". Both fields have a paperclip icon and a speech bubble icon at the bottom right.

13

Click "ALL DONE - GOING TO REVIEW & SUBMIT NOW!" when you are done filling it out.

30. Please list any other questions, concerns, or comments you have at this time.

Long Answer Text

31. ** BY SELECTING THIS OPTION, YOU ARE INDICATING ALL INFORMATION IS CORRECT AND QUESTIONNAIRE IS COMPLETED & ALL TAX DOCUMENTS HAVE BEEN UPLOADED. TO MOVE INTO PREPARATION, PLEASE ANSWER THIS QUESTION AND CLICK "NEXT" TO REVIEW & SUBMIT YOUR ANSWERS. ONCE YOU CLICK "REVIEW & SUBMIT", WE WILL LOCK YOUR QUESTIONNAIRE WORK ON YOUR RETURN. CHANGES RECEIVED AFTER THIS TIME MAY RESULT IN TIME-BINDING REVISIONS **

ALL DONE - GOING TO REVIEW & SUBMIT NOW!

Review & Submit

The screenshot shows a questionnaire form. Question 30 is a long-answer text field. Question 31 is a multiple-choice question with a warning message. The radio button for "ALL DONE - GOING TO REVIEW & SUBMIT NOW!" is highlighted with a pink circle. At the bottom right, there is a "Review & Submit" button and a back arrow.

14

Click "file_download" if you wish to download the organizer to a pdf file or print it out.

Plans Estimated Taxes Miscellaneous REVIEW & SUBMIT Download Questionnaire

ie IRS this year? If yes, attach the notices if *

The screenshot shows a software interface with a navigation bar. The "REVIEW & SUBMIT" tab is active. A download icon (a square with a downward arrow) is highlighted with a pink circle. Below the navigation bar, there are two panels. The top panel has a "Download Questionnaire" button. The bottom panel has a question: "ie IRS this year? If yes, attach the notices if *".

15

If you have finished filling it out and submitted the organizer you are done and can wait for an update on your return!