

DIGITAL ASSETS QUESTIONNAIRE

The following actions and transactions alone, generally don't require you to circle Yes:

- 1) Holding a digital asset in a wallet or account.
- 2) Transferring a digital asset from one wallet or account you own to another wallet or account you own
- 3) Purchasing digital assets using U.S. or other real currency, including through the use of electronic platforms like PayPal or Venmo.

In 2024, did you and/or your spouse: (circle Yes or No)

- | | | |
|-----|----|---|
| Yes | No | Receive digital assets as payment for goods or services provided? |
| Yes | No | Receive or transfer digital assets as a result of a reward or award? |
| Yes | No | Receive new digital assets as a result of mining or staking activities? |
| Yes | No | Receive digital assets as a result of a hard fork? |
| Yes | No | Exchange digital assets for property, goods or services? |
| Yes | No | Dispose of a digit asset in exchange for another for another digital asset? |
| Yes | No | Sell any digital assets? |
| Yes | No | Dispose of a financial interest in any digital assets? |

Please list what wallet you have for each account:

- | | |
|----------|----------|
| 1) _____ | 3) _____ |
| 2) _____ | 4) _____ |

I have disclosed the above information to Markowitz and Associates, Ltd for the preparation of my 2024 income tax return. I further submit that this information is correct to the best of my knowledge.

Signature _____

Date _____

Printed name _____

Please Note: If you are required to report any digital assets transactions on your tax return, you must provide a detailed gain/loss report to us. Markowitz And Associates, Ltd. will not compile this information for you. Some U.S. based brokerages will provide this information but if yours does not and if you cannot produce this information on your own, we recommend that you use a third-party service such to produce the reports for you.

<https://cryptotrader.tax/>

<https://www.cointracker.io>