

Tax Organizer Supplement - Digital Assets

(If you answer yes to any of the statements below, please sign below.)

(1) At any time during 2023 did you *receive, sell, send, exchange or otherwise acquire any financial interest in any digital asset*? Yes ___ No ___

Note: Digital assets include (but are not limited to): (i) convertible virtual currency and cryptocurrency (e.g., bitcoin), (ii) stablecoins and (iii) non-fungible tokens (NFTs).

If yes, (a) Did you buy any digital asset and keep it? Yes ___ No ___

(b) Did you transfer any digital assets between exchanges or wallets?
Yes ___ No ___

(c) Did you sell any type of digital assets for U.S. dollars?
Yes ___ No ___

(d) Did you exchange one type of digital asset for another type of digital asset?
Yes ___ No ___

(e) Did you receive any digital asset for services or products you provided?
Yes ___ No ___

(f) Did you pay for any services or products you received with any digital asset?
Yes ___ No ___

(g) Did you mine for and receive any digital asset?
Yes ___ No ___

(2) During 2023 did you or your spouse have an account with a digital asset or cryptocurrency or virtual currency exchange (e.g., Coinbase, Kraken, Binance, or other similar exchanges)?
Yes ___* No ___

***If yes, list all of the digital or cryptocurrency or virtual currency exchanges that you and/or your spouse had during 2023:**

1. Name of exchange _____ Name on Account _____

2. Name of exchange _____ Name on Account _____

3. Name of exchange _____ Name on Account _____

4. Name of exchange _____ Name on Account _____

Initial: _____ Date: _____

Initial: _____ Date: _____