

Taxpayer Name

2023 Virtual Currency Worksheet

Did you have any of the following activity for virtual currency/digital assets in 2023:

	Buy?	Sell?
	Convert?	Dispose of?
	Rewarded?	Trade?
	Gifted?	Exchange?
Did you earn any virtual currency through mining or by working for others?	Yes	No
Did you give or loan any virtual currency?	Yes	No
Did you receive virtual currency as a gift, reward, or in some other manner?	Yes	No
Did you lose any virtual currency in any manner other than a sale or trade?	Yes	No
Did you hold virtual currency in a foreign exchange?	Yes	No
Did you receive forked/airdropped virtual currency?	Yes	No
Did you purchase assets in any Initial Coin/Exchange/Token Offering?	Yes	No

Additional Notes	
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Values of Cryptocurrency on 12/31/23	
Exchange/Holding (Coinbase, Binance, etc)	USD Value on 12/31/23 - total in your portfolio on this exchange
TOTAL VALUE 12/31/23	

For each exchange/holding please provide us with the following items:
1) Screenshot of the value on 12/31/23
2) Transaction History
3) Gain/Loss Report (if available)

If you had more than 5 reportable transactions in 2023 (sales, conversions, exchanges) then you will be required to use an outside software to add up your gains/losses from cryptocurrency transactions in 2023.

Below we will list commonly used softwares that link up with most exchanges and are the most user friendly from our experiences.

Financial Groove is not associated with these companies but recommend using third party tracking due to the complexity of cryptocurrency laws and the difficulties using reports provided by the exchanges directly. The amount of tax preparation time for Financial Groove to go through your transaction history would be higher than the fees charged by these dedicated cryptocurrency reporting services so we recommend this to save you time and money.

- 1) <https://www.koinly.io>
- 2) <https://cryptotrader.tax>
- 3) <https://www.cointracker.io>

There are more alternatives but these are the most popular. Once your information is plugged in we then need the Gain/Loss Reports they provide you or the Form 8949s they provide to be able to plug the information directly into your tax return.

IF YOU HAVE ANY QUESTIONS PLEASE CALL FINANCIAL GROOVE AT 702-966-0127