

2024 Questionnaire

Please check the appropriate circle and include all necessary details.

****All YES answers should be explained by providing ADDITIONAL DOCUMENTATION and all tax forms received.****

Yes No # **Personal Information** Name: _____
Email Address: _____

- 1 Did your marital status change during the year? If divorced, please provide all legal agreements.
- 2 Did your address change from last year?
- 3 Can you be claimed as a dependent by another taxpayer?
- 4 Did you change any bank accounts, or did routing numbers and/or bank account numbers change that have been used to direct deposit (or direct debit) funds from (or to) IRS or other taxing authority in the past? If so, please send copy of void check.
- 5 Did you or your dependents receive an Identity Protection PIN (IP PIN) from the IRS, or have you been a victim of identity theft? If yes, attach the IRS letter.
- 6 Do you own foreign securities other than through a U.S. brokerage firm, or have signature authority over a foreign financial account, have interest in a foreign trust, or a foreign retirement account?
- 7 Did you make any estimated (ES) payments? If yes, please provide amounts and dates paid.
- 8 Did you reside in or operate business in a Federally declared disaster area?

Health Care Information

- 9 Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for every month for your family? "Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a dependent. If yes, provide any Forms 1095-B and/or 1095-C you received.
- 10 Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? If yes, please provide any Form(s) 1095-A you received. Did you include anyone not reported on your return?
- 11 Did you make any contributions to a Health Savings Account (HSA) or Archer MSA? If yes, please provide Form 5498-SA.
- 12 Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA this year? If yes, please provide Form 1099-SA.
- 13 Did you pay LONG TERM CARE premiums for yourself or your family?
- 14 Did you make any contributions to or receive any withdrawals from ABLE (Achieving a Better Life Experience) account?
- 15 If you are a business owner, did you pay health insurance premiums for your employees this year?

Dependent Information

- 16 Were there any changes in dependents from the prior year, and is anyone else eligible to claim any of your dependents?
- 17 Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,600?
- 18 Do you have dependents who must file a tax return that you would like us to prepare? If yes, please provide information.
- 19 Did you provide over half the support for any other person(s) during the year, and do they live with you?
- 20 Did you pay for child care while you worked, looked for work or were a full time student?
- 21 Did you pay any expenses related to the adoption of a child during the year?
- 22 If you were divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities? Please provide current Form 8332.

Purchases, Sales and Debt Information

- 23 Did you start a new business or purchase rental property during the year?
- 24 Did you have ownership interest in any type of business?
- 25 Did you acquire a new or additional interest in a partnership or S corporation?
- 26 Did you sell, exchange, or purchase any assets used in your trade or business? If so, provide closing/sales docs.
- 27 Did you purchase, inherit or sell any type of real estate during the year? If yes, provide HUD closing statement.
- 28 Did you foreclose on or abandon a principal residence or real property during the year?
- 29 Did you sell or dispose of any stock or collectibles during the year? If so, please provide Form 1099.
- 30 Did you take out a home equity loan this year? If yes, were funds used to improve property?
- 31 Did you refinance a principal residence or second home this year?
- 32 Did you sell an existing business, rental property, or other property this year? If so, provide closing/sales docs.
- 33 Did you have any debts canceled or forgiven this year, such as home mortgage or student loans?
- 34 Did you lend money with the understanding of repayment and this year it has become totally uncollectable?
- 35 Did you purchase a new or previously owned clean vehicle this year that is eligible for the new clean vehicle credit? If yes, attach the vehicle statement from the dealer, even if you received the credit when purchased.
- 36 Did you receive a Form 1099-K for the sale of personal property for a gain or loss? If so, please provide.

Income Information

- 37 Did you have any foreign income or pay any foreign taxes during the year (other than a brokerage account)?
- 38 Did you receive any income from property sold prior to this year?
- 39 Did you receive any unemployment benefits during this year?
- 40 Did you receive any awards, prizes, hobby income, gambling or lottery winnings? If yes, please provide information.
- 41 Did you receive any disability income during the year?
- 42 Did you have any sales or other exchanges of digital assets (including from an airdrop or a hard fork), or used digital assets to pay for goods or services?
- 43 Did you receive any Medicaid waiver payments as difficulty of care during the year?
- 44 Did you receive tip income not reported to your employer this year?
- 45 Did any of your life insurance policies mature, or did you surrender any policies?
- 46 Did you receive any income considered to be nonemployee compensation?
- 47 Did you receive a Form 1099-K, 1099-MISC, 1099-NEC, or other income statement for work done? If yes, please provide.
- 48 Do you expect any major changes in income or deductions next year? If yes, please explain in detail.

****OVER****

Yes No

Deduction Information

- 49 Did you incur a casualty or theft loss during the year? If yes, did loss occur in a federal declaration area?
- 50 Did you have cash/check/electronic charitable contributions? Do you have evidence to substantiate these contributions?
- 51 Were any charitable contributions paid as direct distributions from your IRA?
- 52 Did you make any noncash charitable contributions (clothing, furniture, vehicles, etc.)? If yes, please provide details.
- 53 Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C.
- 54 Please provide amounts of any interest paid and Forms 1098 received.
- 55 Did you pay significant out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)? If yes, please provide amounts and/or listing and/or documentation.
- 56 Did you pay state income or local real estate property taxes this year?
- 57 Did you make any major purchases during the year (cars, boats, etc.)? If yes, please provide amount of sales tax paid.
- 58 Did you incur interest expenses associated with any investment accounts you held?
- 59 Did you make any out-of-state purchases (by telephone, internet, mail, or in person) for which the seller did not collect state sales or use tax?

Retirement Information

- 60 Are you an active participant in a pension or retirement plan?
- 61 Did you receive any Social Security benefits during the year?
- 62 Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k) or other qualified retirement plan? If yes, were any due to a federally declared disaster?
- 63 If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2024?
- 64 Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?
- 65 Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?
- 66 Did you receive any qualified birth or adoption distributions, emergency personal expense distributions, domestic abuse distributions, or terminal illness distributions in 2024? If yes, did you repay any of these distributions in 2024?
- 67 Did you make any qualified charitable contributions (QCD) during the year?

Education Information

- 68 Did you, your spouse, or your dependents attend a post-secondary school during the year?
- 69 Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? If yes, provide Forms 1098-T and amount of qualified expenses.
- 70 Did anyone in your family receive a scholarship of any kind during the year? If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board?
- 71 Did you make any contributions/withdrawals from an education savings or 529 Plan account? If you made withdrawals, were any of these rolled over into an ABL account?
- 72 Did you pay any student loan interest this year? If yes, please provide Form 1098-E.
- 73 Did you cash any Series EE or I U.S. Savings bonds issued after 1989?

Miscellaneous Information

- 74 Did you make gifts of more than \$18,000 to any individual?
- 75 Did you utilize an area of your home for business purposes?
- 76 Did you engage in any bartering transactions?
- 77 Did you retire or change jobs this year?
- 78 Did you incur moving costs because of a permanent change of station as a member of the Armed Forces on active duty?
- 79 Did you pay any individual as a household employee during the year?
- 80 Did you make energy efficient improvements to your main home this year? If yes, please provide details.
- 81 Were you a grantor or transferor for a foreign trust, have an interest in or a signature or other authority over a bank account, securities account, or other financial account in a foreign country?
- 82 Are you an owner/do you control 25% of a company's owner interest for a company registered with a secretary of state before 1/1/25?
- 83 Did you receive correspondence from any State or the Internal Revenue Service? Please provide copies.
- 84 Do you want to allocate \$3 to the Presidential Election Campaign Fund? (Checking yes will not change your tax or reduce your refund.)
- 85 Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?

E-Newsletter

- 86 Are you receiving our FREE monthly electronic newsletter?
If you answered no, please indicate - yes, I would like to receive it, or no, I do not wish to receive it.

Organizer

- 87 Would you like to receive a FULL ORGANIZER PACKAGE?
If you answered Yes, choose: pdf attachment or regular mail, and return with name and address below.

****IMPORTANT** - Email address: _____ (will be used to request additional info and send efile forms)**

**Thank you for taking the time to complete and return this questionnaire.
We look forward to working with you this year and appreciate your business!**

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