2024 Individual Income Tax Questionnaire

	Taxpayer	Spouse
Name		
SSN/ITIN		
Date of Birth		
Occupation		
Phone		
Email		
Filing Status:	Single Head of Household Married Filing Joint/Separate Qualifying Surviving Spouse	

Address:		
City:	**State:**	**Zip code:**

Dependents		
Name	Date of Birth	SSN/ITIN

Document Checklist					
W2	☐	1098-Mortgage INT	☐	1099-S (Home Sale)	☐
1099-NEC	☐	1098-T (Tuition)	☐	1095-A	☐
1099-R	☐	1099-DIV	☐	SSA-1099	☐
1099-B	☐	1099-INT	☐	K-1	☐

		Yes	No
1	At any time during 2024, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?	☐	☐
2	For the ENTIRE YEAR, did you, your spouse, and your dependents have health care coverage provided by either an employer or the government (Medicare, Medicaid, CC, or VA)?	☐	☐
3	Did you purchase health insurance for yourself or a family member through the Health Insurance Marketplace?	☐	☐
4	Did you convert a traditional IRA or roll a qualified plan distribution to a Roth IRA in 2024?	☐	☐
5	Did you (or do you plan to before April 15th, 2025) contribute to a health savings account (HSA) for 2024?	☐	☐
6	Did you receive any distributions from your health savings account (HSA)?	☐	☐
7	Are you a grade K-12 teacher?	☐	☐
8	Did you pay childcare costs for a dependent child under age 13, or costs of caring for a disabled dependent or spouse, so you could work, attend school, or look for a job?	☐	☐
9	Did you pay expenses related to adopting a child?	☐	☐
10	Did you pay any individual $2,700 (on a W2 or 1099) or more to perform household services during the year, such as a nanny, carer, housekeeper, cook, or gardener?	☐	☐
11	Did you have any debts cancelled or reduced (including credit cards and student loans), property repossessed or foreclosed upon, or did you file for bankruptcy?	☐	☐
12	Did you have a financial interest in, or signature authority over, a financial account (such as a bank, securities, or brokerage account) located in a foreign country at any time during 2024?	☐	☐
13	Did you receive a distribution from, or were you the grantor of, or a transferor to, a foreign trust?	☐	☐
14	Do you (T) [or your spouse (S)] want to designate $3 to the Presidential Election Campaign Fund?	☐	☐
15	Do you want to allow your preparer or another individual to discuss your federal return with the IRS?	☐	☐
16	Have you (or your spouse) received an Identity Protection Personal Identification Number (IP PIN) from the IRS?	☐	☐
17	Did you make gifts to a trust or gifts totaling more than $18,000 to any individual during the year?	☐	☐
18	Did you receive a Pay-check Protection Program loan for your Schedule C business?	☐	☐
19	Did you (or do you plan to before April 15th, 2025) contribute to a traditional IRA or Roth IRA for 2024?	☐	☐
20	Did you pay or receive alimony? Do not include child support.	☐	☐
21	Were you granted stock options by your employer and/or exercised employer stock options?	☐	☐
22	Did you purchase a plug-in electric vehicle?	☐	☐
23	Were you in the military in 2024?	☐	☐
24	Have you received a notice from the IRS or State taxing authority?	☐	☐
25	Were you a college student in 2024?	☐	☐
26	Did you purchase or sell your home in 2024?	☐	☐
27	Did you purchase energy-efficient improvements such as solar?	☐	☐
28	Did you receive a first-time home buyer credit for a home purchased in 2008?	☐	☐

29	Did you make estimated tax payments for tax year 2024?	☐	☐
30	Did you make charitable contributions?	☐	☐
31	Are you or your spouse legally blind or disabled?	☐	☐

Direct Deposit			
Type of Account	Routing Number	Account Number	Bank Name

Privacy Policy:
We collect nonpublic information about you from the following sources:
1) Information we receive from you on applications, tax organizers, worksheets, and other forms.
2) Information about your transactions with us, our affiliates, or others.
3) Information we receive from a consumer reporting agency.

We do not disclose any nonpublic personal information about our customers or former customers to anyone, except as required by law.
We restrict access to nonpublic personal information about you to those members of our firm who need to know that information in order to provide services to you. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

Did you refer a client or were referred by a client this year?

If yes who? ___________________________

Thank you for the recommendation!

Please Note:
*There is a surcharge of 3.0% for payment by bank or credit card.
**No post-dated check or credit. (Please do not ask)
**There is a $25.00 fee for a returned personal check.
***Bank Product has a $105.00 surcharge from the bank for using this service to deduct prep fee from refund. Additionally, you must be up to date with your taxes and not currently participating in any instalment agreement or child support that could garnishes your wages.