

# REQUIRED 2024 CLIENT QUESTIONNAIRE

Please check the appropriate box and include all necessary details and documentation.

## Personal Information

1. Did your marital status change during the year? ☐ Yes ☐ No  
If yes, explain: \_\_\_\_\_
2. Did your address change from last year? ☐ Yes ☐ No  
If yes, explain: \_\_\_\_\_
3. Can you be claimed as a dependent by another taxpayer? ☐ Yes ☐ No
4. Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account number change for existing bank accounts that have been used to direct deposit funds from the IRS or other taxing authority during the tax year? (If yes, provide new routing and account # or voided check) \_\_\_\_\_  
\_\_\_\_\_
5. Did you or any 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) ☐ Yes ☐ No

## Dependent Information

1. Were there any changes in dependents from the prior year? ☐ Yes ☐ No  
If yes, explain: \_\_\_\_\_
2. Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,600? ☐ Yes ☐ No
3. Did you provide over half the support for any person(s) other than your dependent children during the year? ☐ Yes ☐ No
4. Did you pay for child care while you worked, looked for work, or while a full-time student? (If yes, provide statement of amount paid) ☐ Yes ☐ No
5. Did you pay any expenses related to the adoption of a child during the year? ☐ Yes ☐ No
6. If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities? (If yes, provide copy of decree) ☐ Yes ☐ No

## Retirement Information

1. Did you receive any Social Security benefits during the year? (Attach SSA-1099) ☐ Yes ☐ No
2. Did you contribute to a pension or retirement plan? ☐ Yes ☐ No

3. Other than contributions shown on your W-2, did you make any contributions ☐ ☐  
 To an IRA, Roth, Keogh, SIMPLE, SEP, 401(k) or other qualified retirement plan?  
 If yes, which type of plan(s) did you contribute to? Please upload year end contribution statement for each plan.
4. Did you make any withdraws or receive lump sum payments from an IRA, Roth, ☐ ☐  
 Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? (Attach 1099-R)  
 If yes, were any withdraws due to a Federally declared disaster? ☐ ☐
5. If you are over age 73, did you take your IRA required Minimum distribution (RMD)? ☐ ☐  
 If yes, was it paid directly to charity as a Qualified Charitable Distribution (QCD)? ☐ ☐

### Income Information

1. At any time during 2024, did you: (a) receive (as a reward, award, or payment ☐ ☐  
 for property or services); or (b) sell, exchange, or otherwise dispose of a digital  
 asset (or a financial interest in a digital asset)?
2. At any time during 2024, did you receive a 1099-K for any of the following: ☐ ☐  
 sale of personal property, crowdfunding solicitation, hobby income, online sales,  
 etc.? (Attach 1099-K)
3. Did you receive a 1099-K that you believe is an error this year? ☐ ☐
4. Did you retire or change jobs this year? ☐ ☐
5. Did you receive any unemployment benefits during the year? (Attach 1099-G) ☐ ☐
6. Did you receive any disability income during the year? ☐ ☐
7. Did you receive any interest or dividend income? (Attach 1099-INT/1099-DIV) ☐ ☐
8. Did you acquire or dispose of any stock during the year? (Attach 1099-B) ☐ ☐
9. Did you receive tip income not reported to your employer this year? ☐ ☐
10. Did any of your life insurance policies mature, or did you surrender any policies? ☐ ☐
11. Did you have any hobby income? ☐ ☐
12. Did you receive any awards/prizes/gambling/lottery winnings? (Attach 1099/W-2G) ☐ ☐
13. Do you have any interest in a partnership or S corporation? (Attach K-1) ☐ ☐
14. Did you have any foreign income or pay any foreign taxes during the year, ☐ ☐  
 directly or indirectly, such as from investment accounts, partnerships or a foreign employer?

### Real Estate Information

1. Did you purchase, refinance, or sell a PRINCIPAL RESIDENCE during the year? ☐ ☐  
 (If yes, provide Closing Statement)

2. Did you purchase, refinance, or sell any OTHER REAL ESTATE during the year?  
(If yes, provide Closing Statement) ☐ ☐
3. Did you receive any income from property sold PRIOR to this year? ☐ ☐
4. Did you receive any rental income? (Attach 1099-MISC if received) ☐ ☐
5. Did you foreclose or abandon a principal residence or real property during the year? ☐ ☐

### Business Information (Schedule C)

1. Did you start a new business during the year? ☐ ☐
2. Did you receive a form 1099-K, 1099-MISC, 1099-NEC or other income statement  
for work done in what is commonly referred to as a "gig" economy or contract work? ☐ ☐
3. Did you sell, exchange, or purchase any assets used in your trade or business? ☐ ☐
4. Did you sell or purchase an existing business or other property this year? ☐ ☐
5. If self-employed, did you utilize an area of your home for business purposes? ☐ ☐
6. Did you engage in any bartering transactions? (Attach 1099-B) ☐ ☐
7. If you are a business owner, did you pay health insurance premiums for your  
employees this year? ☐ ☐

### Deduction and Credit Information

1. Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)? ☐ ☐
2. Did you make any monetary charitable contributions by check or credit card?  
(If yes, provide a list of charities and amounts donated and a receipt for any amount  
over \$249 to substantiate the contribution.) ☐ ☐
3. Did you make any noncash charitable contributions (clothes, furniture, etc.)?  
(If yes, provide a receipt from the donor organization, including details of items  
donated and their fair market value (FMV).) ☐ ☐
4. Did you donate a vehicle or boat during the year? (Attach 1098-C) ☐ ☐
5. Did you pay real estate taxes for your primary home and/or second home? ☐ ☐
6. Did you pay any mortgage interest on an existing home loan? (Attach 1098) ☐ ☐
7. Did you take out a home equity loan this year? ☐ ☐  
If yes, what were the funds used for? \_\_\_\_\_
8. Did you incur interest expenses associated with any investment accounts you held? ☐ ☐
9. Did you make any major purchases during the year (cars, boats, etc.)? ☐ ☐
10. Did you incur a casualty or theft loss in a federally declared disaster area? ☐ ☐
11. Did you lend money with the understanding of repayment and this year it became  
totally uncollectable? ☐ ☐

12. Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan(s)? (Attach 1099-C) ☐ ☐
13. Did you make energy efficient improvements to your main home this year? (Solar, HVAC, water heater, exterior doors, windows, skylights) ☐ ☐
14. Did you purchase a new or previously owned clean vehicle this year that is eligible for the new Clean Vehicle credit? ☐ ☐  
If yes, please attach the vehicle statement (Form 15400) from the dealer, Bill of Sale and registration.

### Education Information

1. Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year? ☐ ☐
2. Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? (Attach 1098-T & receipts for qualified tuition & related expenses) ☐ ☐
3. 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? ☐ ☐
4. Did you make withdrawals from any education savings or 529 Plans? (Attach 1099-Q) ☐ ☐  
If yes, were the funds used for "Qualified higher education" expenses or "Grades K-12" expenses? \_\_\_\_\_
5. Did you make any contributions to a 529 Plan account? (Attach 12/31/22 statement) ☐ ☐
6. Did you pay any student loan interest this year? (Attach 1098-E) ☐ ☐
7. Did you cash any Series EE or I U.S. Savings bonds issued after 1989? ☐ ☐

### Health Care Information

1. Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? (Attach 1095-A) ☐ ☐
2. Did you make any contributions to a Health savings account (HSA) or Archer MSA? (Attach 5498-SA or 12/31/22 statement) ☐ ☐
3. Did you receive any distributions from a Health savings account (HSA), Archer MSA or Medicare Advantage MSA this year? (Attach 1099-SA) ☐ ☐
4. Did you pay long-term care premiums for yourself or your family? (Attach Statement) ☐ ☐

### Miscellaneous Information

1. 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? ☐ ☐  
If yes, how much were the untaxed purchases? \_\_\_\_\_

Yes No

2. Did you make gifts of more than \$18,000 to any individual? ☐ ☐
3. Did you pay any individual as a household employee \$2700 or more during the year? ☐ ☐
4. Did you receive an inherited IRA, retirement account, or stock this year? ☐ ☐
5. Did you receive a distribution from, or were you a grantor or transferor for a FOREIGN trust? ☐ ☐
6. Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a FOREIGN country? ☐ ☐
7. Do you have any foreign financial accounts, foreign financial assets, or hold interest in a FOREIGN entity? ☐ ☐
8. Did you receive correspondence from the State or the IRS?  
If yes, explain and attach a copy: \_\_\_\_\_ ☐ ☐
9. Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due? ☐ ☐
10. Do you want to designate \$3 to the Presidential Election Campaign Fund?  
(If you check yes, it will not change your tax or reduce your refund.) ☐ ☐

**The information is complete and correct to the best of my (our) knowledge.**

Taxpayer signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse signature \_\_\_\_\_ Date \_\_\_\_\_