



2024 Returning Tax Client Questionnaire

Tax Payer Name: _____ Last 4 SSN: _____

Spouse Name: _____ Last 4 SSN: _____

Best Contact Method: Phone: _____ Email: _____

Best Time to contact: **Morning** 8 am to Noon **MID Day**: Noon to 5pm
 Evening 5pm to 9pm **ANY TIME** 8am to 9pm

Personal Information

Yes No

Did your marital status change during the year?
If "Yes," explain _____

Can you or your spouse be claimed as a dependent by someone else?

Did your address change during the year?

New Address _____

Were you, your spouse, or any dependents a victim of identity theft?
If "Yes," explain _____

Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?
If "Yes," provide Notice CP01A from the IRS – that you retrieved online

Dependent Information

Yes No

Did you have any changes in dependents during the year?
If "Yes," explain _____

Can another person qualify to claim any of your dependents?

Did you have any childcare expenses during the year?

Did you have any adoption expenses during the year?

Did you have any children under age 19 or a fulltime student under age 24 with more than \$2,500 of unearned Income

**** Provide documentation for proof of dependent related credits (school records, medical records, daycare records, etc.)**

Health Care Information

Yes No

Did any member of your household have healthcare coverage through the Marketplace?
If "Yes," provide copies of Form 1095-A.

Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?

Were all of the distributions used for health related costs?

Retirement Information

Yes No

Did you receive any payments from a pension, profit sharing, or 401(k) plan during the year?

Did you make any contributions to, withdrawals from, or execute any rollovers from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?

Did you receive any Social Security benefits during the year?

Education Information

Yes No

Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)?

Did anyone in your household attend a post-secondary school during the year?

Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year?

Did you pay student loan interest for yourself, your spouse, or your dependent(s) during the year?



Income, Purchases, Sales, and Debt Information

- | Yes | No | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you cash in any U.S. savings bonds during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you start a new business or purchase any rental property during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you sell an existing business, rental property, or other property during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase any business assets or convert any assets to business use?
If "Yes," provide the cost of the asset, the date it was placed in service, and business use percentage. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase any gasoline, diesel, or special fuels for off-road business use? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any stocks, bonds, or other investments during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you sell a principal residence during the year?
If "Yes," provide closing documentation for the purchase and sale of the home. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have a principal residence or a piece of real property foreclosed on during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you abandon a principal residence or a piece of real property during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you refinance your principal home or second home or take out a home equity loan during the year?
If "Yes," provide all escrow, closing, and other pertinent documentation and information. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any principal or interest during this year from property sold in prior years? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you rent out your home or use it for business? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you sell, exchange, or purchase any real estate during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you acquire a new or additional interest in a partnership or S corporation? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts canceled or forgiven this year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Does anyone owe you money that has become uncollectible? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase a new hybrid, alternative motor, or electric motor energy-efficient vehicle during the year?
If "Yes," provide the purchase documents from the dealer. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive income or incur expenses associated with a fantasy sport league?
If "Yes," provide documentation. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive income or incur expenses associated with car sharing (e.g., Lyft or Uber)?
If "Yes," attach Form 1099-MISC and Form 1099-K. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive income or incur expenses associated with freelancing (e.g., Upwork or TaskRabbit)?
If "Yes," attach Form 1099-K or Form W-2. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive income or incur expenses associated with fashion sharing (e.g., Poshmark or thredUP)?
If "Yes," provide documentation. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive income or incur expenses associated with crowdfunding (e.g., Kickstarter or Indiegogo)?
If "Yes," attach Form 1099-K. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive income or incur expenses associated with a short-term rental (e.g., Airbnb or HomeAway)?
If "Yes," provide documentation. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any other income you have not provided information for with this questionnaire?
If "Yes," explain _____ |

Itemized Deduction Information

- | Yes | No | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any state or local income tax refunds from prior years? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make any major purchases (vehicle, boat, etc.) during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay any real estate property taxes or personal taxes during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay mortgage interest during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you make noncash donations to charity (clothes, furniture, etc.) during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you donate a boat or vehicle during the year?
If "Yes," attach Form 1098-C. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have gambling winnings or losses during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you use your vehicle on the job other than for commuting to work? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you work out of town at any time during the year? |



Miscellaneous Information

Yes No

[] [] Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currencies?
** If, "YES", Please schedule a call with Tara to discuss what is needed **

[] [] Did you have authority over foreign bank accounts in excess of \$10,000?
** If, "YES", Please schedule a call with Tara to discuss what is needed **

[] [] Did you have capital gains over \$250,000 for 2023?

[] [] Did you incur a gain or loss due to damaged or stolen property?
If "Yes," provide the incident date, value of the property, and amount of insurance reimbursements.

[] [] Did you receive a cash payment or digital asset of more than \$10,000 in one transaction?

Yes No

[] [] If "Yes", was form 8300 [Report of Cash Payment over \$10,000] filed with the IRS?

[] [] Did you pay wages to any household employees (babysitter, nanny, housekeeper, etc.)?

[] [] Did you make gifts to any one person in excess of \$17,000 during the year?

Yes No

[] [] If "Yes," are you splitting the gift with your spouse?

[] [] Did you make any energy-efficient improvements to your main home during the year?

[] [] Did you own interest or shares in a Qualified Opportunity Fund?

[] [] Did you apply an overpayment of your 2022 taxes to your 2023 estimated taxes?

[] [] If you have an overpayment of 2023 taxes, do you want the refund applied to your 2024 estimated taxes?

[] [] Did you make any estimated payments toward your 2023 taxes?

[] [] Do you want to have any refund or balance due directly deposited or withdrawn?

[] if YES, are we using the account information we have on file?

[] if NO, please provide updated bank information with a voided check.

[] [] Did you receive any notices from the IRS or state taxing authority, that you have not provided to us?
If "Yes," explain _____

[] [] May the IRS discuss your tax return with your preparer?

[] [] Would you like a copy of your tax return sent to you electronically instead of receiving a printed copy?

[] [] Do you anticipate your income or withholdings to be different for 2024?

If "Yes," provide details.

[] [] Do you have a deadline of when you need your return filed?

If Yes, Please provide the DATE _____

***** if you are providing us less than 3 weeks processing time, you will be charged an additional rush charge [starts at \$200]. ***** Please Initial that you understand _____

Tax Payer Signature _____

Spouse Signature _____

Date Signed _____

Please provide any detailed explanations, additional information or questions below: (Use back if necessary)