

## Questionnaire

Name:

SSN:

Questionnaire

**Personal Information****Yes No**  Did your marital status, name or address change during the year?

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.

**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 child or dependent care expenses during the year?  Did you have any dependents with more than \$2,600 of unearned income (i.e. interest, dividend/capital gains)?**Health Care Information****Yes No**  Did any member of your household have healthcare coverage through the Marketplace (Obamacare)?

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?**Income, Purchases, Sales, and Debt Information****Yes No**  Did you refinance your principal home or second home or take out a home equity loan during the year?  Did you receive any principal or interest during this year from property sold in prior years?  Did you have any debts canceled or forgiven this year?  Did you purchase a new or previously owned clean vehicle (electric vehicle, plug-in hybrid, fuel-cell vehicle, qualified commercial clean vehicle) during the year?

If "Yes," provide the report the dealer or seller is required to provide to you and the vehicle identification number (VIN).

**Itemized Deduction Information****Yes No**  Did you estimate your out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) to exceed 7.5% of your adjusted gross income in 2024?  Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year?  Did you pay any real estate property taxes or personal taxes during the year?  Did you pay mortgage interest during the year?  Did you make cash donations to charity during the year?  Did you make noncash donations to charity (clothes, furniture, etc.) during the year?  Did you have gambling winnings or losses during the year?**Retirement Information****Yes No**  Did you receive any Social Security benefits during the year?  Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?  Did you make any withdrawals or receive distributions from a pension or profit-sharing plan, IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?  Did you execute any rollovers from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?**OVER --->**

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**Education Information**

Yes No

- Did anyone in your household attend a post-secondary school during the year? Provide 1098-T.
- Did you make a contribution to or receive a distribution from an Education Savings Account (529 Plan) or Qualified Tuition Program during the year?
- Did you pay student loan interest for yourself, your spouse, or your dependents during the year?  
If "Yes," provide the amount of interest that was refunded.
- Did you receive forgiveness on a qualifying federal student loan?

**Foreign Tax Information**

Yes No

- Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?
- Did the aggregate value of your foreign accounts exceed \$10,000 at any time during the year?
- Did you have any income from, or pay taxes to, a foreign country?

**Refund, Withholding, and Estimated Tax Information**

Yes No

- Did you make any estimated payments toward your 2024 taxes? Provide amounts paid by date.
- Do you want to have any refund or balance due directly deposited or withdrawn?  
If "Yes," provide a canceled checking or savings slip.
- Do you anticipate your income or withholdings to be different for 2025?

**Miscellaneous Information**

Yes No

- Did you receive, sell, exchange, gift, or otherwise dispose of any digital asset or financial interest in any digital asset?
- Did you incur a gain or loss due to damaged or stolen property, while living in a federally declared disaster area?  
If "Yes," provide the incident date, value of the property, amount of insurance reimbursements, and the declaration number assigned by FEMA.
- Did you make gifts to any one person in excess of \$18,000 during the year?
- Did you make any energy-efficient improvements to your main home during the year?
- Did you make any purchases subject to use tax during the year?
- Did you receive any notices from the IRS or state taxing authority?  
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?

**Preparer Notes**