

EMPLOYMENT & RETIREMENT INFORMATION

#	Yes	No	
1.	<input type="checkbox"/>	<input type="checkbox"/>	Were you employed last year ? Provide form W2 from all employers
2.	<input type="checkbox"/>	<input type="checkbox"/>	Are you contributing to a 401(k), 403(b), or other pre-tax account?

CHILD CARE

Child care expenses paid \$ _____

Provider name: _____ Provider EIN: _____

Address: _____

BASIC QUESTIONS

Please check the box to the left for any of the following that apply. If not, leave blank. If checked, please provide a brief explanation below if the information will assist the preparer in any way. (Note: Please check for you AND your spouse)

Check	
<input type="checkbox"/>	Did your marital status change from the prior year ?
<input type="checkbox"/>	Did you change your address from last year ?
<input type="checkbox"/>	Any change in your dependents from last year ?
<input type="checkbox"/>	Did you child under 19 (24 if a full time student) have more than \$2K in INVESTMENT income ?
<input type="checkbox"/>	Did you pay for any adoption expenses ?
<input type="checkbox"/>	Did you provide OVER half the support for someone you are not claiming as a dependent ?
<input type="checkbox"/>	Are you being claimed on someone else’s tax return ?
<input type="checkbox"/>	Did you purchase, sell or refinance your primary residence ?
<input type="checkbox"/>	Have you been notified by the IRS or State in regarding changes made on prior tax year return?
<input type="checkbox"/>	Did you gift any individual over \$18,000 in 2024?
<input type="checkbox"/>	Did you SELL or Convert any cryptocurrency in 2024 ? 1099B and or Form 8949 will be needed.

Did you purchase any of the following in 2024 for your PRIMARY home?

Exterior Door(s) - Window(s) - Insulation - Central AC - Natural Gas, Propane, or Oil Water Heaters - Natural Gas, Propane, or Oil Furnaces and Hot Water Boilers - Electric or Natural Gas Heat Pumps - Electric or Natural Gas Heat Pump Water Heaters - Biomass Stoves and Boilers - Solar - Windmill - Geothermal ? If yes please let me know energy efficient improvements completed and the \$ amount for each item or items.

INCOME

#	Check	
1.	<input type="checkbox"/>	W-2 Income
2.	<input type="checkbox"/>	Interest and/or Dividends
3.	<input type="checkbox"/>	Tax Exempt Interest and/or Dividends
4.	<input type="checkbox"/>	Taxable refunds, credits or offsets (including prior year state refunds)
5.	<input type="checkbox"/>	Business income (self-employment Income) *If "yes" please fill out Schedule C worksheet and provide financials
	<input type="checkbox"/>	Stock sales (capital gains)- (MAKE SURE ALL BASIS INFO IS PROVIDED)
Amount of any capital loss carry forward from 2023 \$ _____		
7.	<input type="checkbox"/>	Any other assets sold or any other gains or losses
8.	<input type="checkbox"/>	Rental real estate income *If "yes" please fill out Schedule E worksheet
Amount of any passive activity loss carry forward from 2023 \$ _____		
9.	<input type="checkbox"/>	K-1's (1120S, 1065, 1041)
10.	<input type="checkbox"/>	Unemployment
11.	<input type="checkbox"/>	Social Security income
12.	<input type="checkbox"/>	Foreign income
13.	<input type="checkbox"/>	Other income: Please list: _____

ADJUSTMENTS TO INCOME

Please check any of the following that apply to you and/or your spouse:

#	Check	
1.	<input type="checkbox"/>	Educator expenses (teaching expenses)
2.	<input type="checkbox"/>	Health Savings Account deductions
3.	<input type="checkbox"/>	Moving expenses (active military only, service related)
4.	<input type="checkbox"/>	Contributions to SEP, SIMPLE, and other qualified plans
5.	<input type="checkbox"/>	Self-Employed health insurance
6.	<input type="checkbox"/>	IRA contributions
7.	<input type="checkbox"/>	Student loan and/or tuition & fees deduction (you or your dependents) Provide form 1098
8.	<input type="checkbox"/>	Alimony (Applies ONLY to divorce decrees effective prior to 1/1/19)
Alimony paid \$ _____ (paid to whom?)		
Name/SS# _____		

ESTIMATED PAYMENTS MADE FOR 2024 RETURN (or refunds from a prior year applied to current)

\$	Fed	Date	Qtr
\$	Fed	Date	Qtr
\$	Fed	Date	Qtr
\$	Fed	Date	Qtr
\$	State	Date	Qtr
\$	State	Date	Qtr
\$	State	Date	Qtr
\$	State	Date	Qtr

E-FILE / FILING INFO - - REFUND / PMT INFO

How do you want any refund send to you? MUST CHECK ONE	
<input type="checkbox"/>	Checking Account
<input type="checkbox"/>	Savings Account
<input type="checkbox"/>	Paper check by mail (could take several weeks)
Routing #	
Account #	

#	Yes	No	
1.	<input type="checkbox"/>	<input type="checkbox"/>	Did you take money from a 401(k), IRA or other pre-tax account?
2.	<input type="checkbox"/>	<input type="checkbox"/>	Did you make charitable contributions in 2023? If yes, how much? \$ _____

Special Information for the Tax Preparer

#	Yes	No	
1.	<input type="checkbox"/>	<input type="checkbox"/>	Is there something "Unique" that the preparer should pay special attention to or know?
If yes, describe:			