

# 2024 CLIENT QUESTIONNAIRE

**\* CHECK ALL THAT APPLY TO YOUR TAX SITUATION**

## **INCOME SOURCE**

- ☐ Employer W2's
- ☐ Unemployment
- ☐ Social Security (SSA-1099)
- ☐ Retirement plan Distribution (1099 R)
- ☐ Interest (1099 INT)
- ☐ Dividends (1099 DIV)
- ☐ Stock or mutual fund sales (1099 B/  
Broker statements)
- ☐ Self-employment/ misc. income  
(1099NEC/ 1099MISC)
- ☐ Expenses from self-employment
- ☐ Rental Property
- ☐ K1 (partnership, estate, trust income)

## **MEDICAL PREMIUMS**

- ☐ **Medical premiums out of pocket**
- ☐ **Long term care insurance**

## **ITEMIZATIONS**

- ☐ Donated cash/goods to a charity
- ☐ Paid Sales tax on a large purchase (car/  
truck, etc.)
- ☐ Mortgage (1098)
- ☐ Property tax
- ☐ Large out of pocket medical expenses

## **HOUSEHOLD/DEPENDENT**

- ☐ Changed marital or family status
- ☐ Adopted a child
- ☐ Had a new baby (Need SSA #)
- ☐ Paid child/dependent care expenses
- ☐ Paid Tuition (1098 T) and education ex-  
penses
- ☐ Paid Student loan interest
- ☐ **Enrolled in a health insurance plan  
through the Federal or State MARKET-  
PLACE (1095 A)**
- ☐ HSA contribution/distribution

## **MISCELLANEOUS**

- ☐ Sold a home
- ☐ Paid/received Alimony Divorce date: \_\_\_\_\_
- ☐ Had gambling wins/losses (W2G and will  
also need Win/Loss statement from Casino.)
- ☐ Made an IRA (**SELF**) contribution
- ☐ **Received an IRS issued PIN #**
- ☐ Made estimated payments
- ☐ Had any cancellation of debt/foreclosure/  
bankruptcy (1099 C)
- ☐ **Did you do any Energy  
Improvements to your home?**

**Do not leave these questions unanswered. The IRS requires every taxpayer to answer**

**"Yes" or "No" on Form 1040.**

- |   |   |
|---|---|
| 1. At any time during 2024, <b><u>did you or<br/>your spouse:</u></b> a) receive (as a reward,<br>award, or payment property or services);<br>or b) sell, exchange, gift, or otherwise dis-<br>pose of a digital asset (or a financial in-<br>terest in a digital asset)? | payment for property or services); or b) sell,<br>exchange, gift, or otherwise dispose of a digi-<br>tal asset (or a financial interest in a digital<br>asset)? |
| <b>YES      NO</b>  | <b>YES      NO</b>  |
| 2. At any time during 2024, did your <b><u>de-<br/>pendent:</u></b> a) receive (as a reward, award, or  | 3. Did you have any interest/ signature au-<br>thority over any foreign account or foreign<br>trust?  |
| <b>YES      NO</b>  | <b>YES      NO</b>  |

**SIGNATURE:**