

Questionnaire for 2024 Tax Returns

Please complete the information below for onboarding into our software.

If you answer yes to any questions, I will need more information.

New Clients must upload 2 previous years of federal

and state tax returns to your portal

Please Circle the Y or N where indicated

TAXPAYER INFORMATION

Client's Name _____

Phone number _____

email _____

Personal information

Your birthdate _____

Your occupation _____

Y or N Can you be claimed as a dependent on someone else's return?

If yes, who can claim you? _____

Y or N Are you a US citizen or green card holder?

Y or N Are you married?

Y or N Do you want to file separately?

Y or N Did your address change in 2024?

If so, what is you new address? _____

What is your visa status _____

Dependents

Y or N Do you have any dependents -- children, disabled adults -- living with you?

how many? Please provide names, SS#, birthdates (see area at bottom of page 4)

Y or N Do any children earn interest, dividends, and capital gains over \$1,100?

Y or N Do you share custody of any dependents with someone other than your spouse?

Y or N Do you pay for child care?

Please provide name, address, amount paid for each child
and Tax ID# for each Daycare / Day camp

Health Insurance

Y OR N Did you have a medical savings account (MSA)?

Y OR N Did you have a health savings account (HSA)? (this is NOT an FSA)

Y OR N Did you acquire an MSA through the death of an account holder?

Y OR N Did you receive payments under a long-term care (LTC) insurance policy or receive accelerated death

Y OR N Did you purchase insurance through the Affordable Cares Act (ACA/Obamacare)?

If yes, I will need your 1095-A form.

Y OR N For CA, DC, MA, NJ, RI and VT residents, did you or any member of your family
lack health insurance for even

Home

- Y OR N** Did you own a home at any time in the year?
- Y OR N** Do/did you have a mortgage during the year?
- Y OR N** Did you add solar panels to a home?
- Y OR N** Did you refinance your mortgage or take out a new mortgage or home equity loan?
- Y OR N** Did you participate in the first time home buyer's credit program?
- Y OR N** Did you receive any solar power income from home panels?
- Y OR N** For renters, how much rent did you pay in 2024 (by state)?

Income during the tax year

How many employers did you and your spouse have (W-2 wages)?

I will need the W-2s from all.

- Y OR N** Did you receive any social security, RR retirement, or disability income?
- Y OR N** Did you receive any unreported tip income?
- Y OR N** Did you receive any unemployment payments?
- Y OR N** Did you receive any income from contract work (1099-NEC)?
- Y OR N** Did you receive any 1099-MISC or 1099-K forms?
- Y OR N** Did you receive any alimony?

If so, how much?

Date of divorce

Date of alimony agreement

- Y OR N** Did you receive gambling winnings, fantasy sports, jury duty, or other income?
- Y OR N** Did you barter?
- Y OR N** Are you an owner, shareholder or beneficiary of any partnerships, S-Corp, trusts or estates? Do you receive any K-1 forms?

Investments -If yes to any of these questions we will need the 1099 statements

- Y OR N** Do you have interest generating in bank accounts?
- Y OR N** Do you have investment accounts (stock, mutual funds, etc.)?
- Y OR N** Did you buy, sell, trade, or do any other cryptocurrency transaction (or online gambling)?
- Y OR N** Did you buy, sell, or gift digital assets like NFTs?
- Y OR N** Did you cash any US savings bonds?

Retirement Plans- Yes answers require amounts and 1099 statements

- Y OR N** Other than through your employer, did you contribute to a retirement plan?
- Y OR N** Did you receive any distribution or withdraw any money from a retirement plan?
- Y OR N** If so, did you return any to the retirement account?
- Y OR N** Did you transfer or rollover any money from one retirement plan to another?
- Y OR N** Did you withdraw from your retirement in 2024 but were under 59.5 years old?

SPOUSE INFORMATION

Spouse's name _____
Spouse's birthdate _____
Spouse's occupation _____
Spouse's email address _____

Can your spouse be claimed as a dependent on someone else's return? **Y OR N**

If yes, who can claim them? _____

Is spouse a US citizen or green card holder **Y OR N**

The remaining questions apply to you and your spouse (if you have one).

Have you ever been denied (or had reversed) Earned Income Tax Credits (EITC), Child Tax Credits (CTC), Head of Household (HOH) status, or American Opportunity Credits (AOC for tuition)? **Y OR N**

Education

How many household members (spouses and dependents) are in college? **Y or N**
Are any dependents in private K-12?

Do you have a 529 account, ABLE account, or Coverdell account?
Did you receive any distributions from a 529, ABLE or Coverdell account?
In what state is your 529 held?
Did you make contributions during the year?
If so, how much per child ?

Did you pay any student loans during the year? **Y OR N**
If yes, I will need your 1098-E showing the interest.
If in MA, which if any of the student loans are for undergraduate schooling?

Itemized and other Deductions

Did you pay high medical bills out of pocket (exceeding more than 7.5% of your income)? **Y OR N**
Did you have a loss because of a federally declared disaster? **Y OR N**
Did you use your car for volunteer work but were not compensated? **Y OR N**
Did you make cash or non-cash contributions to charities (501c3 or churches)? **Y OR N**

IRS requires written acknowledgement if \$250 or more and proof/receipt if under \$250.
Are you a full time K-12 teacher? (900+ hours in the year) **Y OR N**
Did you pay any alimony? **Y OR N**

Amount paid \$ _____
Date of divorce _____
Date of alimony _____

Business / Rental

Do you own your own business or an income generating hobby? **Y OR N**
Do you own a rental property or rent any portion of your home? **Y OR N**

Foreign Source Income -- at any time in the year

- Did you receive any foreign income? **Y OR N**
- Do you own a business or property in a foreign country? **Y OR N**
- Did you have any foreign investments? (not US mutual funds invested in foreign companies) **Y OR N**
- Did you pay any foreign tax other than through a US mutual fund? **Y OR N**
- Did you have an interest or signature authority over a financial account in a foreign country, e.g., **Y OR N**
- Did you receive any gifts from foreigners or foreign companies (over \$10,000) **Y OR N**

Miscellaneous

- Do you want to discuss any financial changes in the coming years? **Y OR N**
- Do you want to allocate \$3 to the Presidential Election Campaign Fund? **Y OR N**
- Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund? **Y OR N**
- Did you have any debts cancelled or forgiven? **Y OR N**
- Does anyone owe you money which has become uncollectible? **Y OR N**
- Did you move and incur moving expenses as part of military service? **Y OR N**
- Did you hire a nanny or other household employees? **Y OR N**
- Did you receive any inheritance or have any inherited financial assets? **Y OR N**
- Did you purchase a vehicle that can be plugged in (hybrid or full electric)? **Y OR N**
- Did you install a charging station at your home for an electric vehicle? **Y OR N**
- Were you notified or audited by the IRS or the state taxing agent? **Y OR N**
- Did you or your spouse make any gifts to individuals (cash or non-cash) that total more than **Y OR N**
or any gifts to trusts?

May the IRS or state taxing agent discuss your tax return with Coleen Hyland-Goehle, E **Y OR N**

Estimated taxes

- Did you pay estimated taxes to the federal or state governments? **Y OR N**
- Note: Having taxes withheld on your W-2 paycheck is different than estimated taxes.
- If you are due a refund, do you want part of it applied to next year's taxes due? **Y OR N**

Tax Payments and Refunds

If receiving a refund, do you want it directly deposited into a bank account? **Y OR N**

If yes to either, I will need your bank account information: (copy of voided check) or fill out below

Account number _____

Routing number _____

Checking or savings _____

You have reached the END!!!! Remember to upload this to the portal for me.

For notes and additional information ie. Dependent information, estimated tax payments, _____
