

Client Name: _____

Questionnaire - 2024

INSTRUCTIONS: PLEASE READ CAREFULLY

****YOU ARE REQUIRED TO COMPLETE THIS 4-PAGE
QUESTIONNAIRE IN FULL****

Please check the appropriate box for each question listed and include the supporting documentation, if applicable. Most YES answers require supporting documents.

For any YES answers, be sure to provide the applicable documentation and/or written explanation. We have provided a notes section at the end of the Questionnaire for you to include any additional details.

YES NO

Banking Information

1. IRS requires that we verify this information annually. Initial or correct this information on page 3 of the Organizer "Direct Deposit/Electronic Funds Withdrawal Information".
2. Did you initial or correct the information on page 3 and return that page to us? ☐ ☐

Drivers License or State ID:

1. Did you or your spouse obtain a new license or state ID? ☐ ☐
- If yes, then complete page 7 of the Organizer "Identity Authentication" OR send a copy of your new ID's.

Personal Information

1. Did your marital status change during the year? If so, please indicate below: ☐ ☐
- ☐ Marriage ☐ Separation ☐ Divorce ☐ Death ☐ Other _____
2. Did your address change from last year? If yes, please provide the following: ☐ ☐
- Date moved: _____
- New address: _____
3. Can you be claimed as a dependent by another taxpayer? ☐ ☐
4. Did you receive an Identity Protection PIN (IP PIN) from the IRS? ☐ ☐
- If yes, attach the IRS letter for filing returns in 2025.
5. Did you reside in or operate a business in a Federally declared disaster area? ☐ ☐

Dependent Information - N/A ☐

1. Were there any changes in dependents from the prior year? ☐ ☐
- If yes, mark all that occurred relating to your dependents:
- ☐ Birth ☐ Adoption ☐ Death ☐ Child who turned 24
- ☐ Child who turned 19 who is not a full-time student
- ☐ Dependent child who married or divorced
- ☐ Paid 50%+ support for a relative or friend that lived with you 6 months or more
2. Did you include documentation to determine eligibility for the child tax credit? ☐ ☐
- We are required to obtain documentation for each dependent child eligible for the child tax credit. Please provide one of the following statements that includes each child's name:**

- School record or statement
- Health care provider statement or Form 1095
- Child care provider record
- Place of worship statement

- | | YES | NO |
|---|--------------------------|--------------------------|
| 3. Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,600? | ☐ | ☐ |
| 4. Do you have dependents who must file a tax return? | ☐ | ☐ |
| <u>If yes</u> , do you want us to prepare the income tax return(s)? | ☐ | ☐ |
| 5. Did you pay for child care while you worked, looked for work, or while a full-time student? <u>If so</u> , please include the total fees and the provider's information. | ☐ | ☐ |
| 6. If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities? | ☐ | ☐ |
| 7. Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS? | ☐ | ☐ |
| <u>If yes, attach the IRS letter for filing returns in 2025.</u> | | |

Purchases, Sales and Debt Information

- | | | |
|---|--------------------------|--------------------------|
| 1. Did you start or acquire an interest in a <u>new</u> partnership, LLC, S Corporation, or Trust? (If we prepare your returns, no copies are necessary). | ☐ | ☐ |
| 2. Did you start a <u>new</u> sole proprietorship business? | ☐ | ☐ |
| 3. Did you purchase a <u>new</u> rental property? | ☐ | ☐ |
| 4. Was an area of your home used regularly and exclusively for business? <u>NOTE:</u> Working from home does <u>not</u> automatically qualify you for the home office deduction. | ☐ | ☐ |
| 5. Did you purchase or sell a principal residence during the year? <u>If yes, please provide the HUD-1 Settlement Statement for both the sale and purchase of each home.</u> | ☐ | ☐ |
| 6. Did you foreclose or abandon a principal residence or real estate property during the year? | ☐ | ☐ |
| 7. Did you acquire or dispose of any stock during the year? | ☐ | ☐ |
| 8. Did you take out a home equity loan this year? | ☐ | ☐ |
| 9. Did you refinance a principal residence or second home this year? | ☐ | ☐ |
| 10. Did you sell an existing business, rental, or other property this year? | ☐ | ☐ |
| 11. Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan(s)? | ☐ | ☐ |
| 12. Did you purchase a new or previously owned Clean vehicle this year that is eligible for the new clean vehicle credit? <u>If yes</u> , attach the vehicle statement from the dealer. | ☐ | ☐ |
| 13. Did you receive a Form 1099-K for the sale of personal property? | ☐ | ☐ |

Income Information

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|--|--------------------------|--------------------------|
| 1. Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer? | ☐ | ☐ |
| 2. Did you receive income from any of the following sources? <u>If yes</u> , attach supporting documents. | | |
| a. Unemployment benefits? | ☐ | ☐ |
| b. Disability income? | ☐ | ☐ |
| c. Medicaid waiver payments as difficulty of care? | ☐ | ☐ |
| d. Tip income not reported to your employer? | ☐ | ☐ |
| e. Awards, prizes, hobby income, gambling or lottery winnings? | ☐ | ☐ |
| f. Income as an independent contractor? | ☐ | ☐ |
| 3. Did any of your life insurance policies mature or did you surrender any policies? | ☐ | ☐ |
| 4. Did you receive a Form 1099-K, 1099-MISC, 1099-NEC, or other income statement for work done in what is commonly referred to as the "gig" economy? | ☐ | ☐ |
| 5. Do you expect a large fluctuation in income, deductions, or withholding next year? <u>If yes, please provide details in notes section.</u> | ☐ | ☐ |

- | | YES | NO |
|--|--------------------------|--------------------------|
| 6. Did you receive, sell, exchange, gift or otherwise dispose of virtual currency/digital assets, including from nonfungible tokens (NFTs), or use digital assets to pay for goods or services? | ☐ | ☐ |
| 7. Did you have income from more than one state that was different than last year?
<u>If yes, please provide details in notes section.</u> You may be required to file tax returns and may owe taxes in these states. | ☐ | ☐ |

Retirement Information

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|--|--------------------------|--------------------------|
| 1. Did you receive any Social Security benefits during the year? | ☐ | ☐ |
| 2. Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? If yes, please attach Form(s) 1099-R. | ☐ | ☐ |
| a. Were any withdrawals due to a Federally declared disaster? | ☐ | ☐ |
| b. Were any withdrawals considered qualified charitable distributions (QCD)?
<u>If yes, please provide a receipt from the donee organization(s) to substantiate all contributions made.</u> | ☐ | ☐ |
| c. Were any withdrawals for qualified birth or adoption distributions, emergency personal expense distributions, domestic abuse distributions, or terminal illness? | ☐ | ☐ |
| d. Did you repay any distributions during the year? | ☐ | ☐ |
| 3. Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? | ☐ | ☐ |
| 4. If you are eligible, did you, or do you plan to, contribute funds before April 15, 2025 to a SEP IRA, traditional IRA or a Roth IRA for calendar year 2024? | ☐ | ☐ |

Education Information

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|---|--------------------------|--------------------------|
| 1. Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year? | ☐ | ☐ |
| 2. Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? <u>If yes, attach any Form(s) 1098-T and receipts for qualified tuition and related expenses.</u> | ☐ | ☐ |
| 3. Did anyone in your family receive a scholarship of any kind during the year?
<u>If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board? Please provide an allocation for the use of funds.</u> | ☐ | ☐ |
| 4. Did you make any withdrawals from an education savings or 529 Plan account?
<u>If yes, were the amounts used exclusively for qualified expenses?</u>
<u>If yes, were any of these withdrawals rolled over into an ABLE (Achieving a Better Life Experience) account?</u> | ☐ | ☐ |
| 5. Did you make any contributions to an education savings or 529 Plan account?
<u>If yes, were contributions made to Illinois Bright Directions?</u> | ☐ | ☐ |
| 6. Did you pay any student loan interest this year? | ☐ | ☐ |
| 7. Did you cash any Series EE or I U.S. Savings bonds issued after 1989? | ☐ | ☐ |

Health Care Information

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|--|--------------------------|--------------------------|
| 1. Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for you, your spouse if filing jointly, and anyone you can claim as a dependent. <u>If yes, attach any Form(s) 1095-B and/or 1095-C you received.</u> | ☐ | ☐ |
| 2. Did you enroll for lower cost Marketplace Coverage through healthcare.gov?
<u>If yes, attach any Form(s) 1095-A you received.</u> | ☐ | ☐ |
| 3. Did you make any contributions to a Health savings account (HSA) or Archer MSA?
<u>If yes, attach any Form(s) 5498-SA you received.</u> | ☐ | ☐ |

	YES	NO
4. Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year? <u>If yes</u> , attach any Form(s) 1099-SA you received.	☐	☐
<u>If yes</u> , was the distribution used <u>entirely</u> for out-of-pocket medical expenses?	☐	☐
5. Did you pay long-term care premiums for yourself or your family?	☐	☐
6. Did you make any contributions to or receive a distribution from an ABLE (Achieving a Better Life Experience) account?	☐	☐

Itemized Deduction Information

1. Did you have any of the following? If so, please provide the supporting documentation.
 - a. Casualty or theft loss or any condemnation awards during the year that was not covered by insurance? If yes, please provide details. ☐ ☐
 - b. Out-of-pocket medical expenses (Co-pays, prescription drugs, etc.) that exceeds 7.5% of your income? If yes, please provide total amounts paid. ☐ ☐
 - c. Cash charitable contributions? Please provide totals separate from non-cash. ☐ ☐
 - d. Noncash charitable contributions (clothes, furniture, etc.)? ☐ ☐

For non-cash contributions, we need the VALUE of items donated (not the purchase price) and the method used to compute the value (i.e thrift shop appraisal).

 - e. Donated a vehicle or boat during the year? If yes, attach Form 1098-C. ☐ ☐
 - f. Real estate taxes for your primary home and/or second home? ☐ ☐
 - g. Mortgage interest on an existing home loan? ☐ ☐
 - h. Interest expenses associated with any investment accounts you held? ☐ ☐
 - i. Major purchases during the year (cars, boats, etc.)? If yes, please provide bill of sale or total amount of sales tax paid. ☐ ☐
2. Illinois requires individual tax payers to remit Use Tax on purchases from companies outside of Illinois. The state has provided the option to use safe harbor amounts based on your income in order to comply with these requirements.
Did you make any out-of-state purchases (by telephone, internet, mail, or in person) for which the seller did not collect state sales or use tax? ☐ ☐
Check this box to elect the applicable safe harbor which will prevent further inquiry or audit from the state of Illinois or include the total amount of out-of-state purchases here: ☐ _____

Miscellaneous Information

1. Did you make gifts of more than \$18,000 to any individual? ☐ ☐
2. Did you engage in any bartering transactions? ☐ ☐
3. Did you retire or change jobs this year? ☐ ☐
4. Did you pay any individual as a household employee during the year? ☐ ☐
5. Did you make energy efficient improvements to your main home this year that qualify for a residential energy tax credit? Please provide the Manufacturer's Certificate or other documentation that confirms eligibility. ☐ ☐
6. Did you receive a distribution from, or were you a grantor or transferor for a foreign trust? ☐ ☐
7. Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country? ☐ ☐
8. Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity? ☐ ☐
9. Did you receive correspondence from the State or the IRS? If yes, attach copies of the notices. ☐ ☐
10. Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due? ☐ ☐
11. Do you want to designate \$3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund. ☐ ☐