



## INDIVIDUAL QUESTIONNAIRE

Date: \_\_\_\_\_

Taxpayer Name: \_\_\_\_\_ Spouse Name: \_\_\_\_\_

### Personal Information

Yes No

Did your marital status change during 2024?

☐ ☐

If yes, please explain: \_\_\_\_\_

Did your address change from last year?

☐ ☐

Can you be claimed as a dependent by another taxpayer?

☐ ☐

Did you change any bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority?

☐ ☐

Did you receive an Identity Protection PIN (IP PIN) from the IRS?

☐ ☐

If yes, please provide a copy of the IRS letter for filing returns in 2024.

### Dependent Information

Were there any changes in dependents during 2024?

☐ ☐

If yes, please explain: \_\_\_\_\_

Do you have any children under the age 19 or a full-time student under age 24 with unearned income more than \$2,600?

☐ ☐

Do you have dependents who must file a tax return?

☐ ☐

If yes, will they need our assistance to prepare?

☐ ☐

Did you provide over half the support for any other person(s) other than your dependent children during the year?

☐ ☐

Did you pay for childcare while you worked, looked for work, or while a full-time student?

☐ ☐

Is there any other person(s) who lived with you more than half the year, but not claimed by you last year?

☐ ☐

Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS or have they been a victim of identity theft?

☐ ☐

If yes, please provide a copy of the IRS letter for filing returns in 2024.

### Purchases, Sales, and Debt Information

Did you start a new business or purchase rental property during the year?

☐ ☐

Did you sell, exchange, or purchase any assets used in your Schedule C and/or business Schedule E rental activity?

☐ ☐

Did you acquire a new or additional interest in a partnership or S corporation?

☐ ☐

	Yes	No
Did you sell, exchange, or purchase any real estate during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you purchase or sell a principal residence during the year? If yes, please provide copies of the closing statements.	<input type="checkbox"/>	<input type="checkbox"/>
Did you foreclose or abandon a principal residence or real property during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you acquire or dispose of any stock during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you take out a home equity loan this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you refinance a principal residence or second home this year? If yes, please provide copies of the closing statements.	<input type="checkbox"/>	<input type="checkbox"/>
Did you sell an existing business, rental, or other property this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan(s)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you purchase a new or previously-owned electric vehicle this year that is eligible for the Clean Vehicle credit? If yes, please provide the vehicle statement from the dealer.	<input type="checkbox"/>	<input type="checkbox"/>

### Income Information

Did you have any foreign income or pay any foreign taxes during the year not already included on a consolidated 1099 form?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any unemployment benefits during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any disability income during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did any of your life insurance policies mature, or did you surrender any policies?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any awards, prizes, hobby income, or lottery winnings?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any gambling winnings? If yes, please provide your gambling income and loss information.	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive a Form 1099-K, 1099-MISC, 1099-NEC, or other income statement?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any sales or other exchanges of digital assets (including an airdrop or a hard fork), or used digital assets to pay for goods or services?	<input type="checkbox"/>	<input type="checkbox"/>

### Retirement Information

Are you an active participant in a pension or retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any Social Security benefits during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>
If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2024?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?	<input type="checkbox"/>	<input type="checkbox"/>

**Yes    No**

Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, or other qualified retirement plan not listed on your W-2? ☐ ☐

If over the age of 70 ½, did you make any qualified charitable distributions (QCD) during the year? ☐ ☐

Did you receive retirement distributions from a Federal Pension? ☐ ☐

### Education Information

Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend in the coming year? ☐ ☐

Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? If yes, please provide form 1098-T. ☐ ☐

Did anyone in your family receive a scholarship of any kind during the year? ☐ ☐

Did you make any withdrawals from an education savings or 529 Plan account? If yes, please provide Form 1099-Q. ☐ ☐

If you made withdrawals from an education savings or 529 Plan account, were they used for qualified education expenses? ☐ ☐

Did you make any contributions to an education savings or 529 Plan account? ☐ ☐

Did you pay any student loan interest this year? ☐ ☐

Did you cash any Series EE or Series I U.S. Savings bonds issued after 1989? ☐ ☐

### Health Care Information

Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for your family? ☐ ☐

Did you enroll for lower cost Marketplace coverage through healthcare.gov under the Affordable Care Act? If yes, please provide form 1095-A. ☐ ☐

Did you make any contributions to a Health Savings Account (HSA) or Archer MSA? If yes, please provide Form 5498-SA. ☐ ☐

Did you receive any distributions from a Health Savings Account (HSA), Archer MSA or Medicare Advantage MSA this year? If yes, please provide form 1099-SA ☐ ☐

If you received distributions from a Health Savings Account (HSA) or Archer MSA, were they used for qualified medical expenses? ☐ ☐

Did you pay long-term care premiums for yourself or your family? ☐ ☐

### Itemized Deductions

Did you incur a casualty or theft loss or any condemnation awards during the year in a Federally-declared disaster area? ☐ ☐

Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)? If yes, do you believe the expenses were more than 7.5% of your adjusted gross income? ☐ ☐

**Yes    No**

Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)? ☐ ☐

Did you pay real estate taxes for your primary home and/or second home? ☐ ☐

Did you pay any mortgage interest on an existing home loan? ☐ ☐

Did you incur interest expenses associated with any investment accounts you held? ☐ ☐

**Miscellaneous Information**

Did you make gifts of more than \$18,000 to any individual? ☐ ☐

Did you utilize an area of your home for business purposes? ☐ ☐

Did you engage in any bartering transactions? ☐ ☐

Did you retire or change jobs this year? ☐ ☐

Did you pay any individual as a household employee during the year? ☐ ☐

Did you make energy-efficient improvements to your main home this year?  
If yes, please explain: \_\_\_\_\_ ☐ ☐

Did you receive a distribution form, or were you granted or transferor for a foreign trust? ☐ ☐

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? ☐ ☐

Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity? ☐ ☐

Did you receive correspondence from the State or the IRS?  
If yes, please explain: \_\_\_\_\_ ☐ ☐

If you have a Schedule C business and/or Schedule E rental activity, were you required to file any forms 1099, and if so, did you? ☐ ☐  
1099s are typically required if you paid more than \$600 to pay any non-incorporated entity.

Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due? ☐ ☐

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. ☐ ☐

**Comments:**