

Individual Client Questionnaire



(919) 556-9500
mitchellnemitzcpa.com

Full Name: _____

12324 Hampton Way Drive, Suite 201 | Wake Forest, North Carolina, 27587

Are you submitting more than one return today?
(i.e.: a return for another relative, a business, or a trust, etc.) ☐ Yes ☐ No

Are you expecting a K-1 **not** prepared by our firm? ☐ Yes ☐ No

Do you think you will owe this year? If so, how much? \$ _____ (FED) \$ _____ (NC) ☐ Yes ☐ No

Did you buy or sell property in 2024? If yes, we need closing documents. ☐ Yes ☐ No

Did you buy a vehicle last year? ☐ Yes ☐ No

Do you own rental property? ☐ Yes ☐ No

If you have a business or a rental property were you required to file 1099 forms? ☐ Yes ☐ No
If yes, did you file the required forms? ☐ Yes ☐ No

Did you receive health insurance through the government marketplace? ☐ Yes ☐ No
If yes, we need a copy of **Form 1095-A**.

At any time during 2024, did you (a) receive (as a reward, award, or payment for property or services, or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? ☐ Yes ☐ No

Did your marital status change during the year? Explain: _____ ☐ Yes ☐ No

Were there any changes in dependents from the prior year? ☐ Yes ☐ No
If yes, explain: _____

Did you pay any childcare expenses for children 12 or younger? Please provide documentation. ☐ Yes ☐ No

Did your address change from last year? If so, please provide your new address. ☐ Yes ☐ No

Did you make estimated tax payments (not W-2 withholdings)? ☐ Yes ☐ No
If yes, provide dates and amounts paid.

Federal:	Date: _____	Amount: _____	Date: _____	Amount: _____
	Date: _____	Amount: _____	Date: _____	Amount: _____

State:	Date: _____	Amount: _____	Date: _____	Amount: _____
	Date: _____	Amount: _____	Date: _____	Amount: _____

Were there any changes to routing or account numbers for your bank account that was used to direct deposit or draft for your return in the last year? ☐ Yes ☐ No

Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, attach the **IRS letter**. ☐ Yes ☐ No

Did you make any withdrawals (such as RMDs) from an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? ☐ Yes ☐ No