2024 tax questionnaire

Firm Name:	**Zumbahlen, Eyth, Surratt, Foote & Flynn, Ltd.**
Instructions:	Step 1: Review the letter below for details regarding information we will need to collect.
	Step 2: Complete the questions on the "Questionnaire".
	Step 3: Submit this document and any source documents to our firm.

Thank you for being a valued Zumbahlen, Eyth, Surratt, Foote & Flynn, Ltd. client. For tax year 2024 and on, we are simplifying things by sending the key questions we need to know to prepare and understand your tax situation. Additionally we have included questions for confirmation on your contact and banking information (for direct deposit or electronic tax payments).

Please answer the questions on the "Questionnaire" by marking the box if the answer is yes. Then, please complete your current contact information and indicate if your banking information has changed since the prior year.

If you would like a traditional organizer like prior years, please let us know and we will be happy to provide you with one.

After completing the questions, please send it back to our firm along with any source documents. A list of common source documents we will need are listed below. **We no longer accept documents via email due to security concerns for our clients as well as our firm.**

We need your documents via Sharefile (on our website at www.zescpa.com), mail or drop off to our office by March 11, 2025 to ensure we can complete your return. If we have not received your documents by March 11, 2025 an extension may be required.

Thank you for your cooperation as we continue to make things more mobile and secure for all our clients.

Sincerely,
Zumbahlen, Eyth, Surratt, Foote & Flynn, Ltd.

Below are common source documents we will need from you. Place an "x" in the box next to the corresponding source document once you have sent it to our firm.

	W-2
	1099-Misc & 1099-NEC
	1099-Int
	1099-Div
	1099-B - Brokerage Statement
	Charitable donations
	1098-Mortgage Interest Statement
	Property Tax Statements
	1099-R Distributions from Retirement Accounts

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Instructions:	Step 1: Complete the initial contact information and banking questions.
	Step 2: Complete the remainder of the questions in the questionnaire.

Contact and banking information

Name:	
Address:	
Phone number:	
Preferred taxpayer email:	
Preferred spouse email:	If applicable
	Did you change bank accounts or did routing numbers (RTN) and/or bank account numbers change from last year's tax return? If yes, please provide us with a voided check or the routing number and account number for the new bank account, if you would like direct deposit of your refund, if applicable

Personal information

Did your marital status change during the year? If yes, explain:	
Did you live separately from your spouse during the last six months of the year?	
Did your address change from last year? If yes, explain:	
Can you be claimed as a dependent by another taxpayer?	
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.**	
Did you reside in or operate a business in a Federally declared disaster area? The Federally declared disaster areas include victims of hurricanes, tropical storms, floods, as well as wildfires.	

Dependent information

Were there any changes in dependents from the prior year? If yes, explain. Please include dates of birth and social security numbers for new dependents.	
Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of $2,600?	
Do you have dependents who must file a tax return?	
Did you provide over half the support for any other person(s) other than your dependent children during the year?	
Did you pay for child care while you worked, looked for work, or while a full-time student?	
Did you pay any expenses related to the adoption of a child during the year?	
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?	
Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS or have they been a victim of identity theft? If yes, **attach the IRS letter**.	

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 trade or business?	
Did you acquire a new or additional interest in a partnership or S corporation?	
Did you sell, exchange or purchase any real estate during the year?	
Did you purchase or sell a principal residence during the year?	
Did you foreclose or abandon a principal residence or real property during the year?	
Did you acquire or dispose of any stock during the year?	
Did you take out a home equity loan this year?	
Did you refinance a principal residence or second home this year?	
Did you sell an existing business, rental or other property this year?	
Did you lend money with the understanding of repayment and this year it became totally uncollectable?	
Did you have any debts cancelled or forgiven this year, such as home mortgage or student loan(s)?	
Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year?	

Income information

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?	
Did you receive any income from property sold prior to this year?	
Did you receive any unemployment benefits during the year?	
Did you receive any disability income during the year?	
Did you receive any Medicaid waiver payments as difficulty of care during the year?	
Did you receive tip income not reported to your employer this year?	
Did any of your life insurance policies mature, or did you surrender any policies?	

Did you receive any awards, prizes, hobby income, gambling or lottery winnings?	
Did you receive any income considered to be non-employee compensation?	
Do you expect a large fluctuation in income, deductions or withholdings next year?	
Did you have any sales or other exchanges of virtual currencies, or used virtual currencies to pay for goods or services, or you are holding virtual currencies as an investment?	
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?	

Retirement information	
Are you an active participant in a pension or retirement plan?	
Did you receive any Social Security benefits during the year?	
Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?	
If yes, were any withdrawals due to a Federally declared disaster?	
If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2024?	
Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?	
Did you make any contributions to an IRA, Roth, myRA, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?	

Education information	
Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year?	
Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? If yes, **attach any Form(s) 1098-T** and receipts for qualified tuition and related expenses.	
Did anyone in your family receive a scholarship of any kind during the year?	
If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board?	
Did you make any withdrawals from an education savings or 529 Plan account?	
If yes, were any of these withdrawals rolled over into an ABLE (Achieving a Better Life Experience) account?	
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 I U.S. Savings bonds issues after 1989?	
If you are a K-12 teacher, counselor, principal or aide, did you have unreimbursed expenses for the classroom or unreimbursed professional development expenses? If yes, **provide amount.**	

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? "Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a dependent. If yes, **attach any Form(s) 1095-B and/or 1095-C you received.**	
Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? If yes, **attach any Form(s) 1095-A received.**	
Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act?	
If yes, did you share a policy with anyone who is not included in your family?	
Did you make any contributions to a Health savings account (HSA) or Archer MSA?	
Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year? **If yes, attach any Froms 1099-SA received.**	
Did you pay long-term care premiums for yourself or your family?	
Did you make any contributions to an ABLE (Achieving a Better Life Experience) account? If yes, **attach any Form(s) 5498-QA you received**.	
Did you receive any withdrawals from an ABLE (Achieving a Better Life Experience) account? If yes, **attach any Form(s) 1099-QA you received.**	
If you are a business owner, did you pay health insurance premiums for your employees this year?	

Itemized deduction information	
Did you incur a casualty or theft loss or any condemnation awards during the year?	
If yes, did the loss occur in a Federally declared disaster area?	
Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?	
Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)? If yes, please provide evidence such as a receipt from the donee organization, a canceled check, or record of payment.	
Did you donate a vehicle or boat during the year? If yes, attach Form 1098-C or other written acknowledgment from the donee organization.	
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? If yes, **attach any Form(s) 1098 you received.**	
Did you incur interest expenses associated with any investment accounts you held?	
Did you make any major purchases during the year (cars, boats, etc.)?	
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?	

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 incur moving costs because of a permanent change of station as a member of the Armed Forces on active duty?	
Did you pay any individual as a household employee during the year?	
Did you make energy efficient improvements to your main home this year?	
Did you receive a distribution from, or were you a grantor 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?	
Are you an owner or do you control 25% of a company's ownership interest for a company registered with a secretary of state or similar office before January 1, 2024?	
Do you plan to become an owner or control at least 25% of a company's ownership interests for a company registered with a secretary of state or similar office for the first time after January 1, 2024?	
Did you receive correspondence from the State or the IRS? If yes, explain:	
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.	