**Tax Questionnaire**

Please review this questionnaire for any changes to your personal tax situation from last year. Should any of these changes apply please let us know so that we can discuss the circumstances with you.

☐ Did your name as it appears on your social security card change from last year?

☐ Did your marital status as of December 31, 2024, change from 2023?

☐ Did your residential address, phone number or email address change from last year?

☐ Did you or any dependents receive an Identity Protection PIN (IP PIN) from the IRS? Please provide the IRS letter(s) regarding this.

☐ Did you change bank accounts? We will need to update your Direct Deposit/Electronic Funds Withdrawal Information. This is best accomplished with a voided check or deposit slip.

☐ Did you have any transactions involving digital currency (Bit Coin, Ethereum etc.)?

☐ Did you purchase a new or used Electric Vehicle or Plug-in Hybrid vehicle last year?

☐ Did you make any energy saving improvements to your personal residence or install solar, wind or geothermal equipment at your personal residence?

☐ Are you a retired public safety officer (police, firefighter, search and rescue or emergency responder) receiving retirement income from that former position, and you are paying for accident, health or long-term care insurance premiums for yourself or your family?

☐ Did you have significant out-of-pocket medical costs of $5,000 or more in 2024?

☐ Did you buy or sell your primary residence in 2024?

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

☐ Did you retire or change jobs in 2024 or will be doing so in 2025?

**Tax Questionnaire (Continued)**

☐ Are there any changes in your tax dependents from the last year? Please consider the following:

☐ Did you have any children attending college or a trade school beyond high school during the year? If so, please provide Form 1098-T (T as in tuition).

☐ Did you have any children that were a full-time student for at least five months in the past year?

☐ Do you have any dependent children with investment income in excess of $2,600?

☐ Do you have any children 19 years of age or older at the end of 2024, who earned more than $5,050 in 2024?

If your child worked, they may need to file an income tax return. We will be happy to prepare your children’s tax returns. For children that are still your dependents, our standard charge is $35.00. If your child is no longer your dependent, but just getting started in adulthood, they are eligible for a discounted rate based on their income.

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

☐ Did you receive any correspondence from the State or the IRS? Please provide us with a copy if you have not already done so.

☐ Do you have prior year tax returns that are un-filed or are paying on a balance due?

☐ Do you have a foreign bank account or own any property or business interests in a foreign country?