

**ORGANIZER**

<b>Client Name:</b>
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If any of the following items pertain to you or your spouse for 2024,  
please check the appropriate box and provide additional information if necessary.

**Yes No PERSONAL INFORMATION**

Did your marital status change during the year? If yes, provide your marital status as of 12/31/2024? \_\_\_\_\_

Did your address change during the year? If yes, provide updated address. \_\_\_\_\_  
\_\_\_\_\_

Did you receive an Identity Protection Personal Identification Number (IP PIN)? If yes, provide the IRS letter.

**DEPENDENTS**

Were there any changes in dependents? For any new additions; provide name, birthdate, and SSN of child. \_\_\_\_\_

Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2024?

Did you have any children under age 19 or full-time students under age 24 at the end of 2024, with interest and dividend income in excess of \$1,300, or total investment income in excess of \$2,600?

**HEALTH CARE COVERAGE**

Did you receive IRS document Form 1095-A (Health Insurance Marketplace Statement)? If yes, please provide.

Did you contribute to a Health Savings Account for 2024? Amount \$ \_\_\_\_\_

Did you take any distributions from a Health Savings Account? If yes, provide Form 1099-SA.

**INCOME**

Did you receive form(s) 1099-K? If yes, provide copies.

Did you receive any disability income?

Did you have any foreign income or pay any foreign taxes?

Did you or your spouse receive Unemployment income? If yes, provide 1099-G.

## ORGANIZER

**Yes No PURCHASES, SALES AND DEBTS**

Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC? If yes, provide details.

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Did you buy or sell any stocks, bonds or other investment property? If yes, provide details.

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Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? If yes, provide details and/or HUD: \_\_\_\_\_

Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources? If yes, provide receipts.

Did you have any personal debts canceled or forgiven? If yes, provide Form(s) 1099C.

Did you purchase an electric vehicle? If yes, provide purchase documents with VIN#.

**RETIREMENT PLANS**

Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? If yes, provide form(s) 1099-R.

Did you make a contribution to an IRA or SEPP retirement plan?

Type \_\_\_\_\_ Amount (or TBD) \_\_\_\_\_

Did you transfer or rollover any amount from one retirement plan to another retirement plan?

Did you convert **part** or **all** of your traditional/SEP/SIMPLE IRA to a Roth IRA?

**EDUCATION**

Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program? If yes, provide Form 1099-Q and education expenses paid (tuition, etc).

Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? If yes, provide Form 1098-T.

**ITEMIZED DEDUCTIONS**

Did you incur a loss because of a Ponzi Scheme? If yes, provide details: \_\_\_\_\_

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Did you work out of state for part of the year?

Did you make any cash or non-cash charitable contributions? If yes, provide receipts for donations of more than \$300.

**ORGANIZER**

**Yes No ESTIMATED TAX**

If you have an overpayment of 2024 taxes, do you want the excess applied to your 2025 estimated tax (instead of being refunded)?

Do you expect your 2025 taxable income and withholdings to be different from 2024? If yes explain expected changes. \_\_\_\_\_

**MISCELLANEOUS**

Do you want to allocate \$3 to the Presidential Election Campaign Fund?

Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?

May the IRS discuss your tax return with your preparer?

Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account? If yes, provide highest 2024 value in the US \$ \_\_\_\_\_

Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?

Are you a member of the Armed Forces of the United States on active duty who moved pursuant to a military order related to a permanent change of station?

Did you pay wages to a household employee (ie. nanny) in excess of \$2,700? Exclude any payments to your children or routine cleaning, lawn, or similar services.

Were you notified or audited by either the Internal Revenue Service or the State taxing agency? If yes, provide tax notices.

Did you or your spouse make any gifts to an individual (including Sec 529 contributions) that total more than \$18,000, or any gifts to a trust?

Did your bank account information change within the last twelve months? If yes, provide new Bank Information:

Account# \_\_\_\_\_ Routing# \_\_\_\_\_

**CYBER CURRENCIES**

At any time during 2024, did you receive, sell, send, exchange or otherwise acquire any financial interest in virtual currency? If yes, provide details for 2024 transactions.

**TAX PAYMENTS:**

Estimated Tax Payments for 2024 Taxes

<b>Quarter</b>	<b>Amount Paid</b>	<b>Date Paid</b>
<b>1<sup>st</sup> Quarter – 4/15/2024</b>		
<b>2<sup>nd</sup> Quarter – 6/17/2024</b>		
<b>3<sup>rd</sup> Quarter – 9/16/2024</b>		
<b>4<sup>th</sup> Quarter – 1/15/2025</b>		

Extension payment (if applicable): Date: \_\_\_\_\_ Amount: \_\_\_\_\_

**OTHER NEW INFORMATION FOR 2024:**