

We encourage clients to upload tax documents to us securely.
Contact a team member if you need the secure link.

Personal Information:

- Taxpayers' full legal name, date of birth and social security number.
- Taxpayers' cell or home telephone number and email address.
- Dependent(s) full legal name, date of birth, social security number, & months resided with taxpayer.
- Form 8332 executed by custodial parent, if applicable.
- Home address and county of residence as of January 1, 2024.
- Copy of taxpayers' driver's license.

Incomes:

- W-2s for each employer.
- W-2G for gambling winnings and/or a detailed record of losses.
- 1099s for all income reported to the IRS: Dividend income (1099-DIV), Interest income (1099-INT), Miscellaneous income (1099-MISC), Retirement (1099-R), sale of home or real estate (1099-S), Unemployment compensation or State Tax Refund (1099-G).
- Rental income.

Deductions:

- 1098-S Mortgage Interest.
- Real estate taxes on personal residence even if you don't itemize.
- 1098-T Education Expenses: scholarships, itemized receipts of qualified educational expenses.
- Child & Dependent Care Expenses: name, address, Tax ID or Social Security Number of the childcare provider and amount paid per child.
- Business Expenses for self-employed individuals.
- Charitable Contributions: detailed list of donations, contribution date, receipts & value of the donation.
- Did you purchase an electric/hybrid vehicle. Need year, make and model.
- Vehicle excise and sales tax paid (may be deductible if you itemize).
- Medical expenses: insurance premiums, doctor, dentist, eye care, and prescriptions if they are substantial.
- Health Savings Account (HSA) contributions (Form 5498-SA) and distributions (Form 1099-SA).
- Personal rent paid in 2024, include # of months and monthly rent, name & address of Landlord
- Rental (if you own rental real estate) expenses detailed per category.
- Contribution to a 529 College Savings Plan. Withdrawn funds from 529 Plans, Form 1099-Q needed.
- Student loan interest, Form 1098-E.

Other:

- Bank account and routing numbers for direct deposit of your potential refund.
- Estimated Tax Payments – include amount paid, date you made the payment and for which quarter. If you have a copy of the check or receipt if paid online, include a copy.
****Even if our office provided the estimated payment vouchers to pay, our office needs to know that you paid them as prepared as not all clients pay the vouchers provided.***
- Number of children in private grade school or high school.
- SOLD HOUSE: Settlement statement for the sale of real estate. If you received a 1099-S, need for tax return. Also need ALTA settlement statement when you purchased the property and may need renovation cost if the gain on the house is greater than \$250,000 single or \$500,000 married.
- Last year's tax return, if not prepared by us.
- Health insurance through healthcare.gov marketplace we need form 1095-A if you received a reduction in your premium payment.
- Foreign Accounts: Do you have any foreign accounts?
- In 2024, did you receive, sell, send, exchange or acquire any financial interest in any virtual currency?

Please understand that if incorrect information is provided, this could delay your return being processed and/or result in you receiving a tax notice. Any tax notice caused by an error or omission from our team will be handled swiftly and at no cost to the client. All other responses to notices are outside the scope of our original work and subject to our hourly rates.

PERSONAL TAX QUESTIONNAIRE

Please complete this form and include with your tax material.

NAME		SPOUSE NAME	
PHONE		SPOUSE PHONE	
EMAIL		SPOUSE EMAIL	
ADDRESS			
CITY/STATE/ZIP			

1. **HAS YOUR MARITAL STATUS CHANGED:** Yes No
2. **HAS YOUR FILING STATUS CHANGED:** Yes No
3. **NEW/UPDATED DRIVER'S LICENSE (NEED COPY):** **YOU:** Yes No **SPOUSE:** Yes No
4. **DO YOU/SPOUSE HAVE AN IRS PIN#:** Me Spouse No IP Pin # _____
5. **DID YOU GO TO HEALTHCARE.GOV TO OBTAIN INSURANCE?** Yes No *If yes, need Form 1095-A only*
6. **DO YOU HAVE DEPENDENTS CLAIMING ON YOUR TAXES?** Yes No *If Yes, answer these questions:*

DEPENDENTS ON TAX RETURN

- 6a. Are your dependent(s) filing their own taxes? Yes No
- 6b. Are your dependents the same as last year?
 Yes, then go to 5c No, then complete below:

Do not have your dependents claim themselves on their taxes if you want to claim on your taxes.

Child's Legal Name (only if new)	Date of Birth (only if new)	SSN (only if new)

- 6c. **DID YOU PAY FOR PRIVATE SCHOOL/HOME SCHOOL IN 2024?** Yes No *If yes, # of children: _____*
- 6d. **DID YOU OR A DEPENDENT PAY TUITION/FEES FOR COLLEGE?** Yes No *If yes, need Form 1098-T*
 You will have to go online to the college and download, it may not be mailed.
- 6e. **DID YOU INVEST IN 529 COLLEGE CHOICE PLAN?** Yes No *If yes, need year end form*
- 6f. **DID YOU PULL MONEY FROM 529 COLLEGE CHOICE PLAN?** Yes No *If yes, need Form 1099-Q*

7. **DID YOU PAY ESTIMATED TAX PAYMENTS?** **FEDERAL** Yes (see below) No **STATE** Yes (see below) No

ESTIMATED PAYMENTS

If you answered YES: Need copy of check OR amount paid, date check written & quarter payment made in. Write the amounts of estimated payments made below. We do not need the amount you paid on your 2023 tax return or the 4th quarter estimated payment for the 2023 tax return that was due on 1/15/24.

Estimated Payments	Federal		Indiana (specify if other state)	
Qtr / Due Date	Amount Paid	Date Paid	Amount Paid	Date Paid
1 ST 4/15/2024				
2 ND 6/17/2024				
3 RD 9/15/2024				
4 TH 1/15/2025				

8. **IF GETTING REFUND:** Direct Deposit **OR** Check – I want a check mailed
9. **BANK ACCOUNT SAME AS LAST YEAR IF DIRECT DEPOSIT:** Yes No *If no, need new info below*

Bank Account #	Routing #
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10. **DID YOU PAY RENT IN 2024?** Yes No
- IS THE LANDLORD SAME AS LAST YEAR?** Yes No, *New landlord info below:*

Monthly Amount: \$	Name of Landlord:
Address:	
City/State/Zip:	

11. **DID YOU BUY AN ELECTRIC VEHICLE/HYBRID IN 2024?** Yes No *If yes, need copy of purchase agreement*
12. **DO YOU HAVE FOREIGN ACCOUNTS?** Yes No
13. **DO YOU HAVE VIRTUAL CURRENCY/DIGITAL ASSETS?** Yes No
 If yes, did you use it to sell any currency, buy anything, *if yes, need receipts.* Did you receive (as a reward, award or payment) or sell, exchange, gift, or otherwise dispose of a digital asset? Yes No

Signature: _____ Date: _____