

2024	1040	US	Miscellaneous Questions
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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.

PERSONAL INFORMATION

- | Yes | No | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did your marital status change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did your address change during the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were there any changes in dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2024? |

HEALTH CARE COVERAGE

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you and your dependents have health-care coverage for the full year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you obtain your insurance from Covered CA and receive a Premium Tax Credit? If so, please bring/submit Form 1095-A (Health Insurance Marketplace Statement) |

INCOME

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive unreported tip income of \$20 or more in any month? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any unemployment or Paid Family Leave income? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay or receive any alimony? Year of agreement _____ |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any foreign income other than through a US brokerage firm? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you start a business, purchase rental or royalty property or acquire an interest in a Partnership, S-Corporation or Trust? |
| <input type="checkbox"/> | <input type="checkbox"/> | Was your home rented out (including Airbnb, Homeaway, etc) or used for business (other than as an employee)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you pay \$600 or more for services for your business to any one person or company? If yes, did you issue 1099s? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase, sell or refinance any property? If so, please bring closing escrow statement. |
| <input type="checkbox"/> | <input type="checkbox"/> | Did sell any stocks, bonds or other investment property? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any debts canceled or forgiven? |

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Miscellaneous Questions

Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, etc.)?

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

EDUCATION

Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

DEDUCTIONS

If you normally itemize your deductions (Schedule A) did you make any charitable contributions for which you have receipts or canceled checks (under \$250)? Be sure receipts state, "no goods or services were received in exchange."

Did you make a charitable contribution directly from you IRA to an organization?

Did you take equity from your home (refi or HELOC) and use it for other than improving your home?

Did you use your car for business (other than to and from work) for which you kept a mileage log? Business miles _____ and total miles _____ put on the vehicle.

Did you or will you make a contribution to a retirement account for 2024 other than through your employer (IRA, Roth, SEP, SIMPLE, etc.)?

ESTIMATED TAXES

Did you make any estimated payments for 2024? If so, please list dates and amounts.

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 substantially different from 2024?

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?

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- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 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 including digital currency in a foreign exchange? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts? |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you aware of any online or out of state purchases you made where sales tax was not collected? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you earn, receive, sell, exchange or use to make purchases any virtual currency (Bitcoin or other crypto currency)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a 1099K for funds received from/through GoFundMe, Uber, Lyft, Airbnb, Coinbase, Paypal, Venmo or other company ? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you install solar panels on your residence or other energy efficient improvements in 2024? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you purchase an electric or hybrid vehicle this year that qualifies for the EV credit? If so, please bring the Clean Vehicle Seller Report (Form 15400). |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you engage the services of any household employees (nanny or in home health-care not through an organization)? Standard housekeeping or gardening services do not apply here. |
| <input type="checkbox"/> | <input type="checkbox"/> | If you own a business or have a beneficial ownership in one (LLC or small corporation), has the Beneficial Ownership Information report been filed? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you or your spouse make any gifts to an individual that total more than \$18,000? |
| <input type="checkbox"/> | <input type="checkbox"/> | Is your bank account information still the same for Direct Deposit of refunds or Direct Debit of your balance due? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did the IRS issue you an IP PIN? If so, please include the notice with the PIN or the PIN itself _____. |
| <input type="checkbox"/> | <input type="checkbox"/> | Were you notified or audited by either the Internal Revenue Service or your state taxing agency that we have not already discussed? |
| <input type="checkbox"/> | <input type="checkbox"/> | May the IRS discuss your tax return with your preparer? |

Do you prefer a hard copy of your return _____, a digital copy _____ or both _____? Both is a \$15 additional fee at the time of preparation. The fee later in the year is \$30.

Would you like an appointment to pick up and review your taxes _____, have them mailed to you _____ or loaded to the portal _____?

Do you have any questions for me?