

# 2024 TAX RETURN CLIENT UPDATE: PLEASE PRINT LEGIBLY

Please provide a copy of your Driver's License as it is required for electronic filing.

	Taxpayer Information	Spouse Information
Name (as appears on Social Security Card)	_____	_____
Street Address	_____	_____
City, State, Zip Code	_____	_____
SSN	_____	_____
Date of Birth	_____	_____
Cell Phone #	_____	_____
Phone #2	_____	_____
Email address	_____	_____

Dependents: Name, SSN, Birthdate (*If Necessary*)

Dependent 1: \_\_\_\_\_

Dependent 2: \_\_\_\_\_

Dependent 3: \_\_\_\_\_

Dependent 4: \_\_\_\_\_

## BRIEF QUESTIONNAIRE

Thanks for your time, with your help we can better accurately prepare your returns!

### FOR 2024 (Please Circle One)

1. Do you prefer to receive a digital copy of your return through our portal? **Yes** **No**

If so, do you also want a printed copy? **Yes** **No**

2. Would you like a tax organizer next year? **Yes** **No**

If so, do you want to receive it via: **Portal** **Email** **Mail**

3. Would you like to be included in our weekly newsletter? **Yes** **No** (If so, make sure your email address is above.)

4. Did you have health insurance through the **Marketplace** at all during the year? **Yes** **No**

5. Did you receive a tax notice within the last year? **Yes** **No**

6. Did you contribute to an **IRA** for 2024? **Yes** **No**

7. Did you pay **student loan interest** during the year? **Yes** **No**

8. Did you have a child attending a **private school** or who is **home schooled**? **Yes** **No**

9. Did you contribute to a **College Choice 529 Plan**? **Yes** **No**

10. Did you have a **parent living with you**, providing over half of their support/medical bills? **Yes** **No**

11. Did you have **financial interest** in a **foreign financial account(s)** totaling over \$10,000? **Yes** **No**

12. Did you buy or sell **virtual currency (Bitcoin, Ethereum, etc) and/or NFTs**? **Yes** **No**

13. Would you like an income tax projection later in the year (this is a billable engagement)? **Yes** **No**

\* If you answered **YES** to any of the questions above, we may require additional year end forms or information to accurately complete your return.