

2024

1040

US

Miscellaneous Questions

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 *(If yes, provide details)*

- | 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"/> | Could you be claimed as a dependent on another person's tax return for 2024? |

DEPENDENTS

- | | | |
|--------------------------|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <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? |
| <input type="checkbox"/> | <input type="checkbox"/> | 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? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you adopt a child in 2024? |

HEALTH CARE COVERAGE

- | | | |
|--------------------------|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive IRS document Form 1095-A (Health Insurance Marketplace-Covered California), if so, please attach. |
| <input type="checkbox"/> | <input type="checkbox"/> | California residents: Did you have health insurance coverage for the entire year?
<i>Please attach proof of insurance coverage such as Form 1095-B or 1095-C.</i> |

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 cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any disability income? |
| <input type="checkbox"/> | <input type="checkbox"/> | At any time during the tax year, did you: receive or sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any foreign income or pay any foreign taxes? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive any unemployment income? |

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Did you have any gambling winnings and losses to report where you kept a record or diary of your activity?

Did you receive or pay any alimony? What was the amount and date of the agreement?

Have you reported all income you have received from all sources?

PURCHASES, SALES AND DEBT

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

Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?

Did you buy or sell any stocks, bonds or other investment property in 2024?

Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? (*Provide closing disclosure, formerly known as HUD-1, and term of loan*)

Did you purchase a home in 2024 and you were overseas on official extended duty?

Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal, fuel cell energy sources, heat pump or heat pump water heater, central air conditioner, water heater, oil furnace, hot water broiler, biomass stove or broiler, exterior doors, windows or skylights, or insulation materials? Include a copy of the receipt and a description of the improvement.

Did you have any debts canceled or forgiven?

Did you purchase any items that are subject to California 'Use' Tax? Please provide amount purchased out of state.

RETIREMENT PLANS

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

Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

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

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- Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2024?

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? Please provide **Form 1098-T** from the qualified school.

ITEMIZED DEDUCTIONS

- Did you incur a loss because of damaged or stolen property?
- Did you incur major medical, vision, dental, or prescription drug costs?
- Did you pay real estate taxes? (**Provide property tax statements**)
- Did you pay sales tax on major purchases, such as autos, boats, etc.? (**Provide purchase document**)
- Did you pay registration fees for your car?
- Did you pay mortgage interest? **Provide Form 1098**
- Did you make cash charitable contributions? **Provide copies of any giving statements**
- Did you make non-cash charitable contributions? (**If the total amount donated is greater than \$500, provide the date for each contribution and the fair market value (thrift shop value) for the contributed items, along with copies of thrift store receipts**)

ESTIMATED TAXES

- Did you apply an overpayment of 2023 taxes to your 2024 estimated tax (instead of being refunded)?
- 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?

MISCELLANEOUS

- Do you want to electronically file your tax return?

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- 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?
- 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?
- Was your home rented out or used for business?
- Did you pay child and dependent care costs? *(Copy of the year-end statement from the provider)*
- Did you have a medical savings account (MSA), a Medicare + Choice MSA, or acquire an interest in an MSA or a Medicare + Choice MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?
- 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 engage the services of any household employees?
- Were you notified or audited by either the Internal Revenue Service or the State taxing agency?
- Did you or your spouse make any gifts to an individual that total more than \$18,000, or any gifts to a trust?
- Did your bank account information change within the last twelve months?
- If you have a tax refund, would you like your refund directly deposited to your bank account? *Please provide voided check*
- If you have a tax balance due, would you like your payment to be electronically withdrawn from your bank account? *Please provide voided check*
- Would you prefer to receive your tax organizer via Client Portal next year? Please provide current email address.
- Do you prefer a paper copy of your tax return?
- Do you want a digital copy of your tax return?
- Do you prefer an in-office appointment?