

## 2024 Tax Questionnaire

(Circle Y or N)

- Y N Did you receive or sell, exchange, gift, or otherwise dispose of a digital asset(**Cryptocurrency etc**) in 2024?
- Y N If needed, may the IRS discuss your tax return with your preparer?
- Y N Did you receive IRS Form **1095-A** (Health Insurance Marketplace Statement)? If so, please attach.
- Y N Did your **marital status change** during the year?
- Y N Were there any **changes in dependents**?
- Y N Did any of your **dependents** have investment or interest income **in excess of \$1,300**?
- Y N Do you or your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
- Y N Did you receive **unreported tip income** in 2024?
- Y N Did you receive **any disability income**?
- Y N Did you have **any foreign income** or **pay any foreign taxes** outside of investments?
- Y N Did you have an interest in or signature or other authority over a **foreign financial account**, such as a bank account, securities account, or other financial account?
- Y N Do you have an interest in **foreign assets** or have you received a distribution from a foreign Trust?
- Y N Did you **start a business or farm**, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
- Y N Did you **purchase or dispose of any business assets** (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
- Y N Did you **buy or sell any stocks**, bonds or other investment property in 2024? (If yes, circle activity.)
- Y N Did you **purchase, sell, or refinance your principal home or second home**, or did you obtain a home equity loan? (If yes, please circle activity.)
- Y N Did you have any **debts canceled or forgiven**?
- Y N Was your **home rented out or used for business**? (If yes, please circle activity.)
- Y N Did you, your spouse, or a dependent incur **any Tuition Expenses** that are required to attend a college, university, or vocational school?
- Y N Did you or your spouse **make any gifts** to an individual or a trust that total **more than \$18,000 in 2024**?
- Y N Did you or your employer make contributions to a **health savings account (HSA)** this year?
- Y N Did you receive an HSA distribution? If yes, please attach Form **1099-SA**
- Y N Was HSA distribution used for **qualified medical expenses**?
- Y N Did you receive any **Long-Term Care** policy payments or **accelerated death benefits** from life ins?
- Y N In 2024, did you make any **residential energy-efficient improvements** involving solar, wind, geothermal or fuel cell energy sources or **Battery Storage of at least 3 kilowatt hours**?
- Y N Did you purchase new **Energy Star Certified** energy efficient exterior windows or doors, insulation, AC, Furnace, Water Heater, Heat pump, or Biomass stove or pay for a Qualified Home Energy Audit for your main home in 2024?
- Y N Were you notified or audited by either the Internal Revenue Service or the State taxing agency?
- Y N Did your **bank account information change** within the last twelve months?
- Y N Did you **roll over a retirement account** in 2024?
- Y N Did you contribute to an IRA, SEP or SIMPLE plan for 2024?
- Y N Did you **convert any traditional retirement accounts to ROTH** accounts in 2024?

Suggestions: \_\_\_\_\_