Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2024 Tax Season Questionnaire**

**\*\*Returning Client from 2023\*\***

**Please provide a valid ID for both you and your spouse**

Name: ­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Changes: Please note any changes in address, work status or marital status

Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Marital Status \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(MFS provide name/social/dob for spouse)

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ DOB\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SS#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Separated or Divorced (Circle one and provide the dates & do you have legal documentation to support?)

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Legal Documentation: Yes or No

* Do you have W2s **Yes No**

(Please attach all)

* Did you receive Unemployment **Yes No**
* Are you self-employed **Yes No**

(Please provide income/expense details)

* Do you have any other income **Yes No**

(Interest? Dividends?)

* Do you have any stock sells **Yes No**

(Please provide stock basis information)

* Do you have any foreign income **Yes No**
* Do you have any virtual currency **Yes No**
* Did you make estimated tax payments **Yes No**
* Do you have health insurance thru the MarketPlace – Please provide your 1095A

If you are due a refund, do you prefer a **Direct Deposit or Paper Check**

Please provide account information if anything has changed from the previous year – We will review the account information upon Completion of your return.

Bank Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Rtg #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Acct#\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please note we may not file your return without a completed 2024 Questionnaire. We apologize for any inconvenience however these questions will help us to prepare an accurate 2024 tax return.