



Tax Year 2024 Questionnaire

Name(s): _____

Best Phone # _____ Preferred E-mail Address: _____

Please review the following questions. Please bring in supporting documents.

FAMILY INFORMATION Circle Yes or No

- 1. Did your marital status change during the year? YES NO
- 2. Did your address change from last year? YES NO
- 3. Was there a change in dependents from the prior year? (Provide Name and Social Security Number) YES NO
- 4. Can another person qualify to claim any of your dependents? YES NO
- 5. Any children under 19 and full-time student with unearned income in excess of \$2,600? YES NO
- 6. Did you provide over half the support for any other person(s) other than your dependent child(ren) this year? YES NO
- 7. Do you or your spouse want \$3 designated to the presidential Election Campaign Fund? YES NO
- 8. Did you pay for child care while you worked or looked for work or at school? Amount of dependent care paid by your employer? _____ YES NO
- 9. Are you or your spouse blind or disabled? YES NO
- 10. Can anyone claim you as a dependent? YES NO
- 11. Do you want your tax refund direct deposited? Routing Number _____ Acct Number _____ YES NO
- 12. If you have a refund for 2024 do you want it applied as payment to 2025 tax return? YES NO

INCOME INFORMATION Circle Yes or No

- 1. Did you receive any income from wages or salary? Provide W-2 YES NO
- 2. Did you receive any income from Self- Employment? Provide 1099-Misc/1099-NEC See page 4 for organizing information YES NO
- 3. Did you receive any income from the sale of real or personal property? YES NO
- 4. Did you make any withdrawals from a retirement plan? Provide 1099-R YES NO
- 5. Did you receive any interest income? Provide 1099-INT YES NO
- 6. Did you receive dividend income or sale/trade stock? Provide 1099-DIV/1099-B YES NO
- 7. Did you receive any income from a Rental or Farm? Provide 1099-Misc (HUD-1 if new rental) See Questions on Page 3 and Page 4 for organizing information YES NO
- 8. Did you receive any income from a trust, estates, partnership or S-Corp? Provide K-1 YES NO
- 9. Did you receive any income from a 1099-K? YES NO
- 10. Did you receive Social Security benefits during the year? Provide 1099-SSA YES NO
- 11. Did you receive any Unemployment Benefits? Provide 1099-G YES NO
- 12. Did you receive any state refund? Provide 1099-G YES NO
- 13. Did you have any debts canceled or forgiven this year? Provide 1099-C/1099-A YES NO

CONTINUE TO NEXT PAGE

INCOME INFORMATION (CONT)

Circle Yes or No

14. Did you receive any tips, awards, prizes, hobby income, gambling or lottery winnings, tips, jury duty, online sales, inheritance, barter income or any other income not listed. Provide 1099-MISC or W-2G for gambling winnings including proof of any losses. YES NO
15. Did you have any foreign income or any signature authority over a financial account such as: bank account, securities account, brokerage account in a foreign country? AND/OR Hold any foreign financial accounts or assets? YES NO
16. Did you have any Tip income not reported on your W-2? YES NO
17. In 2024, Did you receive, sell, exchange, gift, or otherwise dispose of any digital asset or financial interest in any digital asset? Cryptocurrency/BitCoin (Provide Statement) YES NO
18. Did you receive any income or incur expenses associated with crowdfunding? This would include monies from KickStarter or GoFundMe, ETC YES NO
19. Have you received any other Income not mentioned above? YES NO

MEDICAL INFORMATION

Circle Yes or No

1. Did you pay out-of-pocket medical expenses or premiums? YES NO
 Health insurance (excluding Medicare) _____ Prescriptions _____
 Doctors, Dentists, Hospitals, etc _____ Medical Miles _____
 Lodging _____ Qualified Long Term Care (you) _____ (spouse) _____
2. Did you make any contributions to or receive distributions from an HSA? Or Idaho Medical Savings account? For HSA distributions provide 1099-SA YES NO
3. Did you enroll in the Marketplace for health care coverage? Provide 1095-A YES NO
4. Did you receive insurance from your employer? Provide 1095-B's and 1095-C's YES NO

ADJUSTMENTS AND DEDUCTIONS

Circle Yes or No

1. Did you contribute to an IRA, SIMPLE, SEP, ROTH, or any other retirement plan? YES NO
2. TEACHERS ONLY: Did you have any educator expenses? Amount _____ YES NO
3. Did you make any charitable cash contributions? Amount _____ Total paid to any Idaho Schools, etc _____ YES NO
4. Did you make any non-cash contributions? Total _____ Total to Idaho Youth and Rehab facilities and Educational Entities _____ YES NO
5. Did you pay any student loan interest? Total _____ YES NO
6. Did you have any educational expenses during the year that you paid on behalf of yourself, your spouse, or your dependent(s)? Provide 1098-T/acct print out YES NO
7. Did you make a contribution to or receive a distribution from an Educational Savings Account or Qualified Tuition Program? Provide 1099Q YES NO
8. Did you incur moving costs as a result of Active Military Duty? YES NO
9. Did you pay or receive alimony? YES NO
10. Did you purchase/refinance/sell a home in 2024? Provide HUD-1 statement YES NO
11. Did you suffer any casualty or theft loss due to a Natural Disaster? YES NO
12. Did you make any energy improvements to your home or purchase an electric vehicle? Provide documentation for the purchase YES NO

CONTINUE TO NEXT PAGE

ADJUSTMENTS AND DEDUCTIONS (CONT)

Circle Yes or No

13. Did you own your own home? Provide 1098 YES NO
 1st Mortgage Interest _____ 2nd Mortgage (HELOC) _____
 Amount of 2nd not used to improve property _____ Property taxes paid _____
 Irrigation tax _____ Points _____ Balance of Mortgage _____

MISCELLANEOUS QUESTIONS

Circle Yes or No

1. Do you pay any individual to work in your home on a regular basis? YES NO
2. Did you work or live out of Idaho for any part of the year? YES NO
3. Did you make any purchases without paying sales tax? YES NO
4. Did you receive any correspondence from the IRS or state? YES NO
5. Did you receive an Identity Protection PIN from the IRS? Provide CP01A Letter YES NO
6. Did you give a gift to anyone over \$18,000? YES NO
7. Did you not receive an Idaho refund due to filing late? YES NO
8. Did you incur moving expenses with the military during the year? YES NO
9. Did you sell any personal items for more than you paid for them during 2024? YES NO
10. Would you be interested in receiving a tax update newsletter during the year? YES NO

ESTIMATED TAX PAYMENTS

	Date	Amount	Date	Amount
Federal Tax	Due 4/15/24 _____	_____	Due 9/16/24 _____	_____
	Due 6/17/24 _____	_____	Due 1/15/25 _____	_____

In 2024, did you Make **State** Estimated Payments? If so, how much? _____ YES NO

Privacy Policy

We collect non-public information about you from the following sources:

- Information we receive from you.
- Information about your transactions with us or other (ie financial institutions).

Unless directed by you, we deny access to your personal and account information to anyone other than our staff. Without your permission, we do not disclose any non-public personal information about you to anyone, except when legally required or permitted in connection with fraud investigations and litigation. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your non-public personal information. Our policy applies to all current and former clients.

SELF-EMPLOYED AND RENTAL QUESTIONS

Circle Yes or No

1. Did you have any self-employment income or rental Income? YES NO
2. Did you start this business in 2024? YES NO
3. Did you make payments of \$600 or more to any individual who is not your employee? YES NO
4. Name of Business _____
5. Does the business have a different federal identification number? _____
6. Did you drive your vehicle for business purposes? YES NO
 - a. Was your vehicle available for personal use during off-duty hours? YES NO
 - b. Do you have written evidence to support your deduction? YES NO
 - c. Do you (or your spouse) have another vehicle available for personal use? YES NO
 - d. Do you have written evidence to support your deduction? YES NO

SELF-EMPLOYEED RENTAL WORKSHEETS CONTINUED ON NEXT PAGE

SELF-EMPLOYED AND RENTAL WORKSHEETS

Self-Employed Worksheet

Gross Receipts _____

(Provide 1099-Misc and 1099-K's)

Advertising _____

Bank Fees _____

Communication _____

Commissions and Fees _____

Health Insurance _____

Interest Paid _____

Legal & Prof Fees _____

Liability Insurance _____

Meals _____

Office Supplies _____

Rent Expense _____

Repairs _____

Supplies _____

Subcontractors _____

Taxes and License _____

Travel _____

Utilities _____

Wages _____

Other _____

Asset Purchases _____

Rental Property

Property Address _____

(Provide 1099-Misc and 1099-K's)

Rental Income _____

Advertising _____

Bank Fees _____

Insurance _____

Legal & Prof Fees _____

Management Fees _____

Mortgage Interest _____

Property Taxes _____

Repairs _____

Supplies _____

Utilities _____

Yard Maintenance _____

Asset Purchases _____

Other _____

Vehicle Expense

Make of Vehicle _____

Date Placed in Service _____

Bus Miles _____ Commuting Miles _____

Total Miles driven for this vehicle in 2024 _____

Fuel Costs _____ Repairs Costs _____

Car Insurance _____ Vehicle Interest _____

Business Use of Home

Office was used regularly and exclusively? Yes No

Square Foot of Office _____

Total Sq Foot of Home _____

Daycare Hours _____ Rent _____

Insurance _____ Utilities _____

Repairs _____ Maint _____