

Client Questionnaire- 2024

Personal Information	YES	NO
-Are you married?		
-Did your address change in 2024?		
-Were you directly impacted by either the Palisades or Eaton wild fires?		
-Did your bank account change from the prior year? (2023 on file)		
Dependent Information	YES	NO
-Did you have a new child in 2024? (Fill out new Info on Basic Worksheet)		
-Do you pay for college for yourself or child/children?		
-Do you have any other dependents? (mother, father, relative, etc.)		
-Did any of your dependents have income?		
-Did you pay student loan interest for yourself or child? (Upload 1098-E)		
-Will you or have you contributed to a Coverdell or 529 Plan?		
-Did you maintain a home for someone else other than a dependent?		
- Did you pay for childcare? (Fill out info on Basic Worksheet)		
Purchases, Sales and Debt Information	YES	NO
-Did you start or end a business during the year? Sole Proprietorship?		
-Did you acquire an interest in a LLC, Partnership or C Corp or S Corp? (Upload K1)		
-Did you start an LLC or Corporation? (See page 3)		
-Did you buy or sell any real estate? (Upload HUD1 or Closing Statement)		
-Did you sell any stock or mutual funds during the year? (Upload 1099-B)		
-Do you buy Cryptocurrency or Bit Coin?		
-Did you use Cryptocurrency to purchase anything?		
-Did you sell Cryptocurrency or Bit Coin? (Upload 1099-B or pertinent gain/loss info)		
-Did you purchase an Electric or Hybrid clean vehicle? (Upload Purchase Agreement)		
-Did you purchase a hybrid or green appliances? (Upload receipt)		
Income Information	YES	NO
-Did you receive any wages or W2s? (Upload W2)		
-Did you receive 1099s? have self-employment income? (Upload 1099-MISC or NEC)		
-Did you receive any interest or dividends? (Upload 1099-INT or 1099-DIV)		
-Did you receive any lump sum distributions from a pension or 401K? (Upload 1099-R)		
-Did you make a withdrawal or roll-over from a retirement plan? (Upload 1099-R)		
-Did you receive any unemployment income? (Upload 1099-G)		
-Did you receive or pay alimony? What year is the divorce agreement? _____		
-Did you have any cancellation of debt? (credit card, mortgage, etc.) (Upload 1099-C)		
-Do you have rental income? (Upload Schedule E Worksheet)		
-Did you receive any awards from lawsuits? (Upload 1099-MISC)		
-Did you receive any Social Security Income? (Upload SSA-1099)		

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Deduction Information	YES	NO
-Did you incur a casualty or theft loss?		
-Do you own a home? (Upload 1098 Mortgage Interest Statement)		
-Did you buy a new home? (Upload HUD1 or Closing Statement)		
-Do you have a Home Equity Line of Credit? (Upload 1098 Mortgage Interest Stmt.)		
-Did you pay for PMI? Private Mortgage Insurance?		
-Did you make any cash/non cash charity donations? (See page 3)		
-Did you work out of town during the year?		
-Did you or your dependents go to college? (Upload 1098-T)		
-Do you have any medical expenses?(See page 3)		
-Did you pay for long term care premiums?		
-Do you have a HSA or a MSA? (circle one) (See page 3)		
-Self employed, did you pay for private healthcare for you or family? (See page 3)		
Credit Information	YES	NO
-Have you started an adoption process?		
-Do you have Covered CA insurance? (Upload 1095-A & CA-3895)		
-Did you or will you start a new retirement plan this year?		
-Did you make any Quarterly Estimated Payments? see below**		
Misc. Information	YES	NO
-Are you in the military?		
-Did you make any gifts more than \$18,000?		
-Are you covered by a pension plan?		
-Did you make a SEP, Traditional or Roth IRA contribution? (circle one) (See page 3)		
-Do you have money in a foreign bank account? (See page 3)		
-Do you expect any significant changes in the next year? (please explain)		
Upload all correspondence from the IRS and the FTB.		
-Do you want to file electronically?		
PTE And Estimated Quarterly Info	YES	NO
*Did you make a PTE payment? (see page 3)		
*Were any other payments made? (late payments, penalites, etc.)		
	Federal	CA
**How much did you pay for Q1 (due 4/18/24)		
**How much did you pay for Q2 (due 6/15/24)		
**How much did you pay for Q3? (due 9/15/24)		
**How much did you pay for Q4? (due 1/15/25)		

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Deduction Information

Purchases, Sales and Debt Information		
-Did YOU start an LLC or Corporation? Are you the only shareholder/Partner?	Yes	or No
-Entity Name:		
-Address:		
-EIN:		

Purchases, Sales and Debt Information

Donations under \$250. Use separate sheet for more than 3 donations.	
-Cash Donation	
-Cash Donation	
-Cash Donation	
Any donations over \$250 please upload donation letter. (Required)	
Non Cash Donations	
-Name of Organization	
-Address of Organization	
-Description of Donated Items	
-Original Purchase Cost	
-Today's Approx. Thrift Store Value	

Medical/Dental Expenses

-Doctor, Dentist, Hospital Fees	
-Insurance Premiums (do not include if you have a 1095-A, Covered CA)	
-Medical Aids (Glasses, Contacts, Hearing Aids)	
-Parking Fees & Tolls	
-Prescription Medicines & Drugs	
-Medical Miles Driven	

-HSA or a MSA (Circle what applies) Single or Family plan?	
-Contribution Amount	
-Did you make a SEP, Traditional or Roth IRA contribution (circle one)	
-Contribution Amount and Date	

Further explanations:

-How much money do you have in a foreign account? (Upload 12/31/24 Bank Statement)	
-How much did you pay for Health Care Premiums for you and your family?	
-How much did you make in PTE payments? June 15th and in December 2024?	
other-	
other-	