

## 2024-2025 QUESTIONNAIRE

### TAX RETURNS WILL NOT BE PREPARED WITHOUT A QUESTIONNAIRE !!

This seems repetitious annually but often this info changes & accuracy is important

- 1) CLIENT NAME(s) \_\_\_\_\_
- 2) Did you get married, divorced, adopt or have any children in 2024 - details required  
\_\_\_\_\_
- 3) Did you move in 2024 - details required  
\_\_\_\_\_
- 4) Your full Bank **routing** number for auto-deposit \_\_\_\_\_ Savings \_\_\_\_ Checking \_\_\_\_
- 5) Your full Bank checking/savings **account** number \_\_\_\_\_
- 6) Cell Phone # \_\_\_\_\_ Home/Work # \_\_\_\_\_
- 7) Email \_\_\_\_\_
- 8) Do you prefer to be contacted by: Email \_\_\_\_ Phone Call \_\_\_\_ Text \_\_\_\_

#### DRIVERS LICENSE INFORMATION:

- 9) **Annually we are required** to include taxpayer's D/L information as Identity Verification:

FIRST name on Return \_\_\_\_\_ DL# \_\_\_\_\_

Issue Date \_\_\_\_\_ Exp Date \_\_\_\_\_

SECOND name on Return \_\_\_\_\_ DL# \_\_\_\_\_

Issue Date \_\_\_\_\_ Exp Date \_\_\_\_\_

#### RECEIVING MY COPIES: (Receiving tab on our Homepage has details) check **only one below**

- 10 \_\_\_\_\_ I/We agree to copies (no charge) sent in an email with personal information masked  
\_\_\_\_\_ I/We understand to the **\$25 fee** to receive paper copies sent by U.S. mail
- 11 Do you prefer to pay by: \_\_\_\_\_ Venmo \_\_\_\_\_ Zelle \_\_\_\_\_ CashApp \_\_\_\_\_ Credit/Debit Card

AMOUNT OWED TO THE IRS:

You have options if you have an amount due (X) for option(s) you're interested in

- \_\_\_\_\_ You can pay online for free from your checking account.
- \_\_\_\_\_ We can send you paper coupons to mail in your payment.
- \_\_\_\_\_ We can initiate an Installment Agreement for you if needed.
- \_\_\_\_\_ We can pay your Balance Due *at the time* we electronically file your return(s)  
(We'll contact you for your pre-approval, with the amount, before filing)

YOU DO NOT NEED TO REPLY-just confirm you haven't overlooked any that pertain to you

- \_\_\_\_\_ W-2's, 1099's, Unemployment Compensation 1099-G
- \_\_\_\_\_ Report any interest and/or dividends from banks or investment accounts
- \_\_\_\_\_ Did you have any transactions with Bitcoin or any form of **digital assets**
- \_\_\_\_\_ Withdrawals and/or Contributions to an IRA/401k/SEP - paperwork is required
- \_\_\_\_\_ Retirement/Pension received - Form 1099-R
- \_\_\_\_\_ Health Savingsf Account paperwork is required - BOTH Form 1099-SA and Form 5498
- \_\_\_\_\_ Healthcare Marketplace Insurance Information Form 1095-A
- \_\_\_\_\_ Did you receive a W2-G for Gambling Winnings
- \_\_\_\_\_ Student Loan Interest Paid Form 1098-E
- \_\_\_\_\_ Tuition Paid/Educational Expenses Form 1098-T
- \_\_\_\_\_ Did you receive a 1099-C (for Cancellation of Debt)
- \_\_\_\_\_ Mortgage and property tax information for 2024 if it's determined you're able to itemize
- \_\_\_\_\_ Rent paid for a MI residence - need Landlord's name & address and monthly amount paid
- \_\_\_\_\_ Childcare Costs - need daycare provider name, ID#, address and total amount paid
- \_\_\_\_\_ Sub-Contractors/Self-employed submit income & expense summary and form 1099-NEC
- \_\_\_\_\_ Those collecting SS, SSI or SSDI benefits - Submit year end SSA-1099 Statement(s)
- \_\_\_\_\_ If you receive Medicare & have a secondary insurance policy what is the monthly cost
- \_\_\_\_\_ If you received Child Support include the amount when submitting your papers

**YOU MAY RECEIVE AN AUTOMATED TEXT FROM OUR  
OFFICE FROM: 313-992-2117**