

INCOME TAX RETURN QUESTIONNAIRE

Client Name _____

Client Name _____

Filing Status and Dependents	Yes	No	Comment
Did your address change?			
Did your marital status change?			
Were there any changes in dependents?			
Are you supporting anyone not living with you?			
Income	Yes	No	Comment
Have you changed employment?			
Has your income changed?			
Do you have self-employment income or loss?			
Did you start a business, purchase a rental property or farm, or acquire interests in partnerships of S corporations? Need documentation if YES			
Did you receive any disability or unemployment payments? Need tax document if YES			
Did you receive alimony? Did you pay alimony?			
Did you surrender any U.S. savings bonds?			
Did you have foreign income/gifts?			
Did you buy or sell any stocks, bonds or other investment property?			
At any time during 2024, did you (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?			
Did you have any cancellation of debt (1099-C)?			
Did you make any withdrawals from an IRA or Pension before age 59 1/2?			
Did you make any withdrawals from an education savings account or Section 529 plan?			
Do you own a second residence or any other real estate? If so, do you rent it out?			
Did you receive a 1099-K? You may be required to print the 1099-K from your account.			
Do you have any lottery or gambling winnings?			
Did you have any jury duty income?			
Retirement	Yes	No	Comment
Did you or your spouse reach age 73?			
Did you take your Required Minimum Distributions (RMD), if applicable?			
Did you or your spouse receive Social Security benefits?			
Did you or your spouse receive any 1099-Rs, Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.?			

Retirement (continued))	Yes	No	Comment
Did you convert part or all of your regular IRA/SEP/SIMPLE IRA into a Roth IRA?			
Have you or do you plan on contributing to a Traditional IRA, Roth IRA, SEP, Keogh or SIMPLE plan?			
Itemized deductions	Yes	No	Comment
Did you pay out-of-pocket medical expenses (co-pays prescriptions, braces, hearing aids, etc.)?			
Did you take out a home equity loan this year?			
Did you purchase, sell, or refinance your principal home or second home, or take out a home equity loan? Need Mortgage interest statement.			
Did you face any foreclosure transactions on your personal residence?			
Do you have any charitable contributions? We will need back-up information for contributions.			
Do you have any medical or charity mileage?			
Did you have any property damaged due to a storm, fire, or other natural disaster located in a federally declared disaster area?			
Tax Credits	Yes	No	Comment
Did you have any energy efficient home improvements in 2024? Examples include exterior doors, exterior windows and skylights, insulation and air sealing materials or systems, central air conditioners, natural gas, propane, oil water heaters, oil furnaces, heat pumps, etc. If YES include receipts.			
Did you make contributions to an HSA? If YES need 1099 SA			
Did you make payments for Long Term Care Insurance? If YES need statement of payment.			
Did you purchase a new, qualified plug-in EV or fuel cell electric vehicle (FCV) in 2024? If YES include receipt from purchase.			
Miscellaneous	Yes	No	Comment
Did you make any estimated federal or state tax payments towards your income tax?			
Were you a resident of (or did you have income in) more than one state?			
Do you have any daycare costs for your dependents?			
Did you give a gift of more than \$17,000 to one or more people?			
Are you enrolled in health insurance through the Marketplace?			
Did you make purchases of taxable property or services outside of NYS? Were those purchases or services used in NYS?			

We will need all tax documents pertaining to your tax return. Please add additional information on a separate sheet of paper.

Client Signature _____ Date _____

Spouse/Partner Signature _____ Date _____