

2024	1040	US	Miscellaneous Questions
------	------	----	-------------------------

If any of the following items pertain to you or your spouse for 2024, please check the appropriate box and provide additional information if necessary.

PERSONAL INFORMATION

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Did your marital status change during the year?
<input type="checkbox"/>	<input type="checkbox"/>	Did your address change during the year?
<input type="checkbox"/>	<input type="checkbox"/>	Could you be claimed as a dependent on another person's tax return for 2024?

DEPENDENTS

<input type="checkbox"/>	<input type="checkbox"/>	Were there any changes in dependents?
<input type="checkbox"/>	<input type="checkbox"/>	Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2024?
<input type="checkbox"/>	<input type="checkbox"/>	Did you have any children under age 19 or full-time students under age 24 at the end of 2024, with interest and dividend income in excess of \$1,300, or total investment income in excess of \$2,600?
<input type="checkbox"/>	<input type="checkbox"/>	Did you pay an individual or an organization to perform services for the care of a dependent under 13 years old or your spouse or dependent age 13 or over, if physically or mentally incapable of caring for themselves in order to enable you to work or attend school on a full-time basis??
<input type="checkbox"/>	<input type="checkbox"/>	If so, please provide detailed information about each individual or organization to whom the expenses were paid during the year for each dependent

HEALTH CARE COVERAGE

<input type="checkbox"/>	<input type="checkbox"/>	Did you receive IRS document Form 1095-A (Health Insurance Marketplace Statement), if so, please attach.
--------------------------	--------------------------	--

INCOME

<input type="checkbox"/>	<input type="checkbox"/>	Did you receive unreported tip income of \$20 or more in any month?
<input type="checkbox"/>	<input type="checkbox"/>	Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive any disability income?

2024	1040	US	Miscellaneous Questions
------	------	----	-------------------------

☐

☐

Did you have any foreign income or pay any foreign taxes?

PURCHASES, SALES AND DEBT

☐

☐

Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?

☐

☐

Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?

☐

☐

Did you buy or sell any stocks, bonds or other investment property in 2024?

☐

☐

Did you sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 days of 2025?

☐

☐

Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?

☐

☐

Did you purchase a home in 2024 and you were overseas on official extended duty?

☐

☐

Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?

☐

☐

Did you have any debts cancelled or forgiven?

☐

☐

Does anyone owe you money which has become uncollectible?

RETIREMENT PLANS

☐

☐

Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

☐

☐

Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?

☐

☐

Did you transfer or rollover any amount from one retirement plan to another retirement plan?

☐

☐

Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2024?

EDUCATION

☐

☐

Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?

2024	1040	US	Miscellaneous Questions
-------------	-------------	-----------	--------------------------------

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? |
|--------------------------|--------------------------|--|

ITEMIZED DEDUCTIONS

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you incur a loss because of damaged or stolen property? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you work out of town for part of the year? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you use your car on the job (other than to and from work)? |

ESTIMATED TAXES

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Did you apply an overpayment of 2023 taxes to your 2024 estimated tax (instead of being refunded)? |
| <input type="checkbox"/> | <input type="checkbox"/> | If you have an overpayment of 2024 taxes, do you want the excess applied to your 2025 estimated tax (instead of being refunded)? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you expect your 2025 taxable income and withholdings to be different from 2024? |

MISCELLANEOUS

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to electronically file your tax return? |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you want to allocate \$3 to the Presidential Election Campaign Fund? |
| <input type="checkbox"/> | <input type="checkbox"/> | Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund? |
| <input type="checkbox"/> | <input type="checkbox"/> | May the IRS discuss your tax return with your preparer? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account? |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts? |
| <input type="checkbox"/> | <input type="checkbox"/> | Was your home rented out or used for business? |

2024	1040	US	Miscellaneous Questions
<input type="checkbox"/>	<input type="checkbox"/>	Did you have a medical savings account (MSA), a Medicare + Choice MSA, or acquire an interest in an MSA or a Medicare + Choice MSA because of the death of the account holder? Or, were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?	
<input type="checkbox"/>	<input type="checkbox"/>	Are you a member of the Armed Forces of the United States on active duty who moved pursuant to a military order related to a permanent change of station?	
<input type="checkbox"/>	<input type="checkbox"/>	Did you engage the services of any household employees?	
<input type="checkbox"/>	<input type="checkbox"/>	Were you notified or audited by either the Internal Revenue Service or the State taxing agency?	
<input type="checkbox"/>	<input type="checkbox"/>	Did you or your spouse make any gifts to an individual that total more than \$18,000, or any gifts to a trust?	
<input type="checkbox"/>	<input type="checkbox"/>	Did you want to pay taxes due on your return and deposit the refund due you via direct debit/credit from/to your bank account?	
<input type="checkbox"/>	<input type="checkbox"/>	If Yes to the above, would you like to use the same bank account as last year? If not, please provide the bank name, account number and routing number of the account you would like us to use.	
<input type="checkbox"/>	<input type="checkbox"/>	At any time during the tax year, 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)?	