



EA YASH SHAH

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Contact : +91 8000 315213

Client Name:

Spouse:

Yes No

Personal Information

1a. ☐ ☐

Are you an existing EYS Taxes client?

1b. ☐ ☐

Does EYS have a copy of your prior year tax return?

1c. ☐ ☐

Will all of your tax documents be available and provided to EYS by April 1st?

2a.

What is your marital status as of 12/31/2024?

2b. ☐ ☐

Were there any changes to your marital status in 2024?

2c. N/A

Did you get married in 2024?

2d. N/A

Did you get divorced in 2024?

3. ☐ ☐

Were there any changes to your address in 2024?

4a. ☐ ☐

Did you have any dependencies in 2024?

4b. ☐ ☐

Do you need EYS to file any tax returns for your dependents?

4c. ☐ ☐

Were there any changes to your dependents in 2024?

INCOME

5. ☐ ☐

Did you received any W-2's for 2024?

6. ☐ ☐

Did you receive any interest, dividend, or capital gain income from accounts not held with EYS during 2024?

7. ☐ ☐

Did you or a dependent receive any social security income for 2024?

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8. ☐ ☐

Did you receive a distribution/rollover from a retirement account, pension, or annuity?

9. ☐ ☐

Did you receive any gambling income for 2024?

10. ☐ ☐

Did you own any rental properties during 2024?

11. ☐ ☐

Did you receive any K-1's for any businesses not prepared by EYS for 2024?

12a. ☐ ☐

Were you self-employed (received 1099-NEC income) during 2024?

12b. N/A

Did you use a portion of your home exclusively for self-employed business purposes during 2024?

12c. N/A

Did you use your vehicle for self-employed business purposes during 2024?

12d. N/A

Did you purchase your own health insurance policy during 2024?

12e. N/A

Did you/would you like to contribute to a self-employed retirement plan (solo 401k, SEP IRA, Simple IRA, profit-sharing plan, etc.) for 2024?

13a. ☐ ☐

Did you sell a house during 2024?

13b. ☐ ☐

Was the house you sold being used as a rental property?

14. ☐ ☐

Did you have any other income for 2024?

DEDUCTIONS

15. ☐ ☐

Did you own a home during 2024?

16. ☐ ☐

Did you make any charitable contributions during 2024?

17. ☐ ☐

Did you own a car or boat during 2024?

18. ☐ ☐

Did you pay for any substantial medical expenses out of pocket during 2024?

19. ☐ ☐ Did you/a dependent pay any student loan interest or education expenses during 2024?
20. ☐ ☐ Did you/would you like to contribute to a traditional IRA for 2024?

Client Name:

21. ☐ ☐ Did you/would you like to contribute to a Roth IRA for 2024?
22. ☐ ☐ Did you/would you like to contribute to an HSA outside of your payroll for 2024?
23. ☐ ☐ Are there any other deductions you think you might be eligible for that were not mentioned previously?

CREDITS

24. ☐ ☐ Did you purchase an electric vehicle during 2024?
25. ☐ ☐ Did you have solar panels or an electric vehicle charging station installed during 2024?
26. ☐ ☐ Did you pay for any childcare for any dependent under 13 during 2024?
27. ☐ ☐ Are there any other credits you think you might be eligible for that were not previously mentioned?

MISCELLANEOUS

28. ☐ ☐ Were you or your spouse active duty military during 2024?
29. ☐ ☐ At any time during 2024 did you own, purchase, or sell any digital assets (cryptocurrencies, NFTs, etc.)?
30. ☐ ☐ At any time during 2024 did you or your spouse have signature authority over a foreign bank account?

31. ☐ ☐

Did your state/country of primary residence change during 2024?

32. ☐ ☐

Did you make any estimated tax payments for 2024?

33. ☐ ☐

If applicable, would you like any refunds to be directly deposited into a bank account?

34. ☐ ☐

If applicable, would you like any amounts due with your return automatically withdrawn from a bank account?

35. ☐ ☐

If applicable, would you like any estimated tax payments automatically withdrawn from a bank account?

Client Name:

36. ☐ ☐

Did you make any non-charitable gifts over \$17,000 (\$34,000 if married filing joint) to any single individual during 2024?

37. ☐ ☐

Is there any additional information you'd like to provide that you think would be helpful in preparing your tax returns?

Based on your responses in the questionnaire above, please provide us with the following documents and information.

New Address Information			
Street Unit	<input type="text"/>	<input type="text"/>	
City State Zip Code	<input type="text"/>	<input type="text"/>	<input type="text"/>
Country (If not US)	<input type="text"/>		

New Dependent Information			
Name	Date of Birth	Social Security Number	Relationship
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Foreign Bank Account Information						
New	Financial Institution	Address	Account Number	Account Type	Max balance in 2024	Currency
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

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Estimated Tax Payments For 2024				
Amount - Federal	Date Paid	State	Amount - State	Date - Paid

Electronic Banking Information	
Type of Account:	
Financial Institution:	
Routing Number:	
Routing Number:	

Based on your responses in the questionnaire above, please provide us with the following documents and information:

- 1b. Please upload a copy of your prior year tax return.
- 4b. Please upload all tax documents for your dependent's tax return.
5. Please upload all W-2's.
6. Please upload all 1099-DIV, and any brokerage account 1099 for accounts not managed by EYS.
7. Please upload all Social Security statements (Form SSA-1099).
8. Please upload all retirement account distributions/rollovers (Form 1099-R).
9. Please upload all your gambling income.
10. Please upload all rental income and expenses PER property, including any tax forms received for the income and expenses.
- 12b. Please provide the total interior square footage of your home and the square footage of the portion of your home used EXCLUSIVELY for business purposes.

Total square footage: Business square footage:

Client Name:

Based on your responses in the questionnaire above, please provide us with the following documents and information:

12c. Please provide the total mileage driven and the total business mileage driven.

Total mileage:

Business mileage:

12d. Please provide the amount you paid out of pocket for health insurance premiums.

Health insurance:

12e. Please provide the amount you'd like to contribute to your self-employed retirement account for 2024 (or indicate MAX to have IFA calculate the maximum allowable contribution).

Already contributed:

Additional contribution:

Max:

13a. Please upload the seller's closing statement and original buyer's closing statement, along with any tax forms received pertaining to the sale of the home.

13b. Please provide the amount of improvements made to the property.

Improvements:

14. Please upload any other income you received, including the relevant tax documents.

15. Please upload the amount of mortgage interest (Form 1098) as well as the amount of property taxes paid during 2024.

16. Please upload the cash and non-cash charitable contributions during 2024.

17. Please upload the personal property taxes paid during 2024.

Client Name:

18. Please provide the amount of medical expenses paid out of pocket during 2024.

Prescriptions:

Doctors & Dentists:

Hospitals & Nursing Homes:

Long-term Care Premiums:

19. Please upload the amount of student loan interest (Form 1098-E) or education expenses (Form 1098-T) paid during 2024.

20. Please provide the amount already contributed and the amount you'd like to contribute to a traditional IRA for 2024 (or write MAX to have EYS calculate the maximum allowable contribution).

Already contributed:

Additional contribution:

Max:

21. Please provide the amount contributed/you'd like to contribute to a Roth IRA for 2024 (or write MAX to have EYS calculate the maximum allowable contribution).

Already contributed:

Additional contribution:

Max:

22. Please provide the amount you'd like to contribute outside of your W-2 to an HSA for 2024 (or write MAX to have EYS calculate the maximum allowable contribution).

Additional contribution:

Max:

23. Please upload any additional information relating to any other deductions to which you may qualify for 2024.

24. Please upload the make, model, year, and VIN number for the electric vehicle purchased during 2024.

Client Name:

25. Please upload the total cost of solar panel/electric vehicle charging station installation during 2024.

26. Please upload the cost of childcare per dependent, including the name, address, and tax ID of the provider.

27. Please upload additional information relating to any other credits you think you may qualify for during 2024.

31. Please provide additional information relating to where and when you moved during 2024.

36. Please provide additional information relating to the gift and recipient during 2024

37. Please provide/upload any additional information you think would be helpful in preparing your tax returns.

Date :

Date :

Submit