

A & A TAX SERVICE

Tax & Accounting Solutions for Individuals & Small Businesses

2024 Tax Return Questionnaire

Taxpayer: Last name _____	Spouse: Last name (if different) _____
First name _____ Middle initial _____	First name _____ Middle initial _____
Social Security # _____ Date of birth _____	Social Security # _____ Date of birth _____
Occupation _____	Occupation _____
Email address _____	Email address _____
Cell phone _____	Cell phone _____
Office phone _____	Office phone _____
Preferred contact person _____	Preferred contact method <u>Email</u> <u>Call Cell</u> <u>Call Home</u> <u>Call Office</u>
Home address _____	Home phone _____
City _____ State _____	Zip _____

Did you move during 2024? No Yes: Date moved _____ From _____ To _____

Did you renew your driver's license since your last tax return filing? No Yes: provide copy of front and back of license
If you are a new client, provide a copy of front and back of driver's license.

On 12/31/24, were you (circle one) Married Not Married

Did your marital status change during 2024? No Yes: explain _____

Did you have a baby or adopt a child in 2024? No Yes: provide date of birth, social security #, gender

List your dependents for 2024:

First, middle initial, last name	Relationship	Social Security #	Date of birth	college education expenses?	childcare expenses?

If receiving a tax refund, do you want the refund to be directly deposited into your bank account? No Yes: If yes, complete the following:

Bank name _____ Routing # _____ Account # _____ Type of account _____

(note: if you owe taxes, we will ask you how you want to pay the taxes; your account will not automatically be debited)

Please answer the following questions for 2024: (if yes, indicate whether Taxpayer, Spouse, or Both)

- did you buy a house? No Yes: provide Closing Disclosure
 did you sell a house? No Yes: provide Closing Disclosure
 did you refinance a mortgage? No Yes: provide Closing Disclosure and Form 1098 for all lenders
- did you pay mortgage interest? No Yes: provide Form 1098 for all lenders
 pay real estate taxes? No Yes: provide Form 1098 and/or receipts
- did you work for more than one employer? No Yes: provide W-2 for each total # employers in 2024: _____
 did you change jobs? No Yes: date _____
- were you self-employed? No Yes: provide total income & expenses by type; include all 1099s received
- did you collect social security? No Yes: provide Form SSA-1099
- did you collect unemployment insurance? No Yes: provide Form 1099-G
- did you take a distribution from a retirement plan? No Yes: provide Form 1099-R
- did you make a contribution to a traditional IRA or other retirement plan? (outside of payroll withholdings) No Yes: provide Form 5498
- did you make a contribution to a Roth IRA? No Yes: provide Form 5498
- did you take a distribution from a Health Savings Account (HSA)? No Yes: provide Form 1099-SA and Form 5498-SA
- did you earn any interest income? No Yes: provide Form 1099-INT
 did you earn any dividend income? No Yes: provide Form 1099-DIV
- did you buy and/or sell stocks, bonds, mutual funds? No Yes: provide Form 1099-B
- did you actively trade virtual currency? No Yes: provide report showing sales proceeds and cost basis
- did you have gambling winnings? No Yes: provide Form W-2G for winnings and details of total losses, if any
- did you incur college tuition and other expenses? No Yes: provide Form 1098-T; and additional expenses (housing, meals, books, etc.)
- did you pay student loan interest? No Yes: provide Form 1098-E
- did you make a contribution to a 529 plan? No Yes: provide annual plan statement
 did you withdraw funds from a 529 plan? No Yes: provide Form 1099-Q
- did you incur childcare expenses? No Yes: provide receipt and/or details of provider name, address, tax ID #, and total amount paid
- did you incur significant medical expenses? No Yes: provide total amount of medical expenses by type; include receipts if available
- did you purchase health insurance? (outside of payroll withholdings) No Yes: provide Form 1095-A if purchased from govt. Marketplace
- did you make charitable contributions? No Yes: Cash \$ _____ Noncash \$ _____ provide receipts/statements if available
- did you make estimated tax payments? No Yes: Total paid: Federal \$ _____ State \$ _____ Dates paid _____

Notes: _____

