

## 2024 Individual Tax Return Questionnaire

Check this box if you have signed your tax return Engagement Letter and returned it to us.

*NOTE: We cannot begin the return until we have the signed Engagement Letter.*

Check this box if you have gathered all of your tax documents together prior to providing them to us.

*NOTE: Please do not send us documents one at a time.*

**YES**  **NO** Will you will have itemized deductions that exceed the standard deduction? If yes, provide documents to support your itemized deductions.

*The standard deduction amounts are: Single: \$14,600 (\$16,550 if 65 or older) Head of Household: \$21,900 (\$23,850 if 65 or older) Married Filing Jointly: \$29,200 (\$32,300 if both are 65 or older) Married Filing Separately: \$14,600 (\$16,150 if 65 or older) **Approximately 90% of our clients opt for the standard deduction.***

**YES**  **NO** Did Hurricane Helene cause any damage to your property? If yes, please explain what type of damage you sustained and whether personal or business property was damaged.

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\_\_\_\_\_

**YES**  **NO** Did you or a member of your household receive health insurance through a government marketplace? If yes, provide a copy of Form 1095-A that you received.

**YES**  **NO** Did you make 2024 estimated tax payments? If yes, then provide the dates and amounts of each estimated tax payment that you made to the federal and/or state governments.

**Federal**

**State**

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**YES**  **NO** Would you like us to calculate estimated payments for 2025, If yes, please tell us about any changes to your tax situation in 2025.

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**YES**  **NO** Do you have foreign bank accounts or financial accounts with funds that amount to more than \$10,000 or \$50,000? If yes, list each one:

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**YES**  **NO** Did your bank account change? If yes, provide updated banking info. Please provide the bank name, routing number, account number, and account type:

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\_\_\_\_\_

**YES**  **NO** Did you have any significant changes in your situation? If yes, list each one below:

*NOTE: Examples of a "significant change" are: divorce, death of family, change in dependency, change of address, change of phone number or email address, etc.*

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