

Questionnaire 2024

Please check the appropriate box and include all necessary details
When in doubt, please check the "Not Sure" box so that we can discuss the issue with you.

Names: \_\_\_\_\_ Spouse's Name \_\_\_\_\_

Contact Information

E-mail address(es): \_\_\_\_\_ or [ ] I don't use e-mail

Phone Numbers (just enter the one(s) you would like us to use)

Home number: \_\_\_\_\_ Work or Cell number: \_\_\_\_\_ Other \_\_\_\_\_

How do you prefer to be contacted? [ ] E-mail [ ] Phone—circle best number.

Please check this box if you might owe tax this year [ ]

Personal Information

Did you marry, divorce, separate or become widowed during the year? Yes [ ] No [ ] Not Sure [ ]

Did your address change since last year? Yes [ ] No [ ] Not Sure [ ]

New Address: \_\_\_\_\_ Date Moved: \_\_\_\_\_

Do you live with parents, relatives or friends or depend on them to pay your bills? Yes [ ] No [ ] Not Sure [ ]

Do you want to change the bank account where any refund gets directly deposited? Yes [ ] No [ ]

If yes, please attach a voided check (not deposit slip.) The IRS is strongly discouraging taxpayers from paying any estimated payments or tax due by mailed check. If you owe taxes or pay estimates, choose one

If left blank, we will assume you will pay online.

- [ ] paying by scheduled direct debit\* (we enter your bank info but you verify it)
[ ] paying online (we won't give you vouchers to mail with a check)
[ ] mailing a check (Still available but should be avoided. If you send a check and then get a notice of tax due, please check to see if the check has cleared. If it has NOT cleared, we ask that you wait for a second bill before asking us for help.)

\*If you owe and may be subject to penalty, paying by direct debit cuts your penalty from 5% to 2.5%

How do you want your copy of your return? [ ] Paper copy, or [ ] PDF uploaded to our secure portal.

There will be a \$15 fee for postage & handling if we need to mail your packet. I will pick up [ ] Please Mail [ ]

Purchases, Sales, and Debt Information

Did you start a new business or buy rental property during the year? Yes [ ] No [ ] Not Sure [ ]

Did you sell, exchange, or purchase any real estate during the year? Yes [ ] No [ ] Not Sure [ ]

Did you buy or sell stock during the year? (We need the 1099 form) Yes [ ] No [ ] Not Sure [ ]

Did you sell a business, rental, or other property this year? Yes [ ] No [ ] Not Sure [ ]

Did you have any debts canceled, such as credit cards or car loans? Yes [ ] No [ ] Not Sure [ ]

Did you pay any student loan interest this year? Please give us the 1098-E Yes [ ] No [ ] Not Sure [ ]

Did you lend \$10,000 or more to anyone or lend any amount for a mortgage? Yes [ ] No [ ] Not Sure [ ]

Other Income Information

Do you receive or pay Alimony? Received \$ \_\_\_\_\_ Paid \$ \_\_\_\_\_ Yes [ ] No [ ] Not Sure [ ]

To or from who: \_\_\_\_\_

If yes, check here if we already have a copy of your divorce order [ ] or please get us a copy.

Do you have any income from hobbies or odd jobs? Yes [ ] No [ ] Not Sure [ ]

Please check "Yes" or "Not Sure" if you sell produce or farm products (and you are not a farmer), sell items through home parties, get paid to teach classes, monitor tests, sell items online, or sell craft items. ALL INCOME GREATER THAN 49¢ (it gets rounded up to \$1) MUST BE REPORTED.

Describe briefly: \_\_\_\_\_

Did you win any prizes (not just money) from bingo, raffles, gambling (online or in person) or fantasy

sports? (Includes any amount even if small. You cannot use losses to offset wins in all cases!

Yes  No  Not Sure  If yes or not sure, describe \_\_\_\_\_

Did you withdraw or receive any money from any **retirement** account? Yes  No  Not Sure

Did you have any retirement funds sent directly to a charity? (called a QCD) Yes  No  Not Sure

Did you withdraw money from an **education savings** (529) plan? We need 1099Q Yes  No  Not Sure

Did you receive an **inheritance** recently or do you expect one this year? Yes  No  Not Sure

Did you receive **tip income not reported to your employer**? Yes  No  Not Sure

Did you cash in any life insurance policies or U. S. Savings Bonds? Yes  No  Not Sure

Do you own a second residence or any other real estate? Yes  No  Not Sure

Do you rent out a room, home or RV short-term such as through Airbnb? Yes  No  Not Sure

Are you a member (owner) of an **LLC**, or a partner or shareholder in a partnership or corporation? If **yes**, **THERE IS A NEW REQUIREMENT** that corporations, partnerships & LLCs must file a Beneficial Owner Information Report although a recent court case just made them temporarily optional. We DO NOT file these. For more information: <https://boiefiling.fincen.gov/>

Did or do you own any cryptocurrency or receive any as a gift or award? Yes  No  Not Sure

“Cryptocurrency” (like Bitcoin) includes “non-fungible tokens” (NFTs) such as digital trading cards.

## Medical Insurance

If your Medical insurance was through Vermont Health Connect or another Healthcare Exchange, **please check here**  **and make sure you bring us your form 1095A** which lists your premiums paid and any assistance you got. If you are SURE, you received no premium assistance or Form 1095A, check here

## Miscellaneous Information

Did you **give** more than \$17,000 (cash or something of value) to anyone? Yes  No  Not Sure

Did you change the deed on your home to give a share to anyone (your children)? Yes  No  Not Sure

Did you make any contributions to the Vermont (VHEIP) education savings plan (529)? Yes  No  Not Sure

Did you retire, **start drawing social security** or change jobs in 2024? Yes  No  Not Sure

Do you **plan to retire** or start drawing social security in the current year? Yes  No  Not Sure

Did you purchase any solar energy panels or a geothermal pump in 2024? Yes  No  Not Sure

(If yes, please give us a copy of the receipt or tell us the total cost)

Did you install new windows, doors or skylights in your home? Yes  No  Not Sure

Did you make any energy improvements to your home, buy any efficient water heating, heating or cooling equipment or buy a car which is considered a “clean vehicle”? Yes  No  Not Sure

We will need a receipt, any documents you have showing it is “energy star” qualified, VIN or other info about efficiency. The lifetime limits on replacement windows, doors, skylights, and insulation are gone!

Did you lose property in a federally declared disaster area during the year? Yes  No  Not Sure

Did you get any unexpected letters from a state tax department or the IRS? Yes  No  Not Sure

If yes, please give us a copy or explain: \_\_\_\_\_

## Foreign Account & Asset Reporting

This section is meant to help you avoid ACCIDENTALLY violating the complex reporting requirements. The penalties start at around \$10,000. You do not have to have ANY FOREIGN INCOME to get these penalties. Do you have any connection with any **foreign countries** (including Canada)? Connections may include: bank accounts, pensions, real estate owned, relatives or close friends living abroad who may have given you power over or access to accounts in another country? Or, do you work somewhere (such as World Learning) and have signatory authority over accounts in another country? Yes  No  Not Sure  \*\*\*If “No” initial here: \_\_\_\_\_

If you answered “Yes” or “Not Sure” please ask for and complete the Foreign Interests Worksheet.

## SIGNATURE

 Signature \_\_\_\_\_ Date \_\_\_\_\_ 

1/7/25

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