

2024	1040	US	Miscellaneous Questions
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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"/>	Did your bank account information change within the last twelve months?
<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 dependents between the ages of 19 and 24 enrolled as full-time students for at least 5 months 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?
HEALTH CARE COVERAGE		
<input type="checkbox"/>	<input type="checkbox"/>	Did you and your dependents have health care coverage for the full-year?
<input type="checkbox"/>	<input type="checkbox"/>	Did you and/or your dependents have health care coverage through the Marketplace during 2024? If so, please provide Form 1095-A (Health Insurance Marketplace Statement).
INCOME		
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive any disability income?
<input type="checkbox"/>	<input type="checkbox"/>	Did you have any foreign income or pay any foreign taxes?
PURCHASES, SALES AND DEBT		
<input type="checkbox"/>	<input type="checkbox"/>	Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
<input type="checkbox"/>	<input type="checkbox"/>	Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
<input type="checkbox"/>	<input type="checkbox"/>	Did you buy or sell any stocks, bonds or other investment property in 2024?

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Yes	No	
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<input type="checkbox"/>	<input type="checkbox"/>	Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you make any residential energy-efficient improvements to your home (A/C, water heater, heat pump, windows & doors, solar, etc.) or purchase a new electric vehicle? If so, please provide receipts/invoices with product specifications, manufacturer's certification, and the time-of-sales report for electric vehicles
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<input type="checkbox"/>	<input type="checkbox"/>	Did you have any debts canceled or forgiven? If so, provide Form 1099-C.
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**RETIREMENT PLANS**

<input type="checkbox"/>	<input type="checkbox"/>	Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you transfer or rollover any amount from one retirement plan to another retirement plan?
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<input type="checkbox"/>	<input type="checkbox"/>	Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2024?
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**EDUCATION**

<input type="checkbox"/>	<input type="checkbox"/>	Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program?
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<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? If so, provide Form 1098-T and a list of expenses for books and supplies purchased as required by the school.
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**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)?
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<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)?
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<input type="checkbox"/>	<input type="checkbox"/>	Do you expect your 2025 taxable income and withholdings to be different from 2024?
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Yes      No

- ☐      ☐ Did you make estimated tax payments during 2024? Please list the amount of each payment made below:

Amounts & Dates

	<u>Federal</u>	<u>State</u>
1st quarter	_____	_____
2nd quarter	_____	_____
3rd quarter	_____	_____
4th quarter	_____	_____

MISCELLANEOUS

- ☐      ☐ Do you want to allocate \$3 to the Presidential Election Campaign Fund?
- ☐      ☐ Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?
- ☐      ☐ May the IRS discuss your tax return with your preparer?
- ☐      ☐ 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?
- ☐      ☐ Was your home rented out or used for business?
- ☐      ☐ 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?
- ☐      ☐ 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?
- ☐      ☐ Were you notified or audited by either the Internal Revenue Service or the State taxing agency?
- ☐      ☐ Did you or your spouse make any gifts to an individual that total more than \$18,000, or any gifts to a trust?
- ☐      ☐ At any time during the tax year, did you: receive or sell, exchange, gift, or otherwise dispose of a digital asset (crypto currency, NFTs, etc.)?
- ☐      ☐ Did you make any cash donations to 501(c)(3) charities during 2024? Please provide a breakdown of amounts and charities.
- ☐      ☐ Did you use an HSA to pay for qualified medical expenses in 2024? If so, please provide Form 1099-SA.
- ☐      ☐ If you have Arizona tax due, would you like to offset it with donations to qualified Arizona charities?