

Questions — All Taxpayers

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse—ask your preparer if you are unsure about a question.

LIFESTYLE & TAXES	Yes	No	Are either you or your spouse legally blind?			
	Yes	No	Have you received any notice from the IRS or state revenue department within the past year? If yes, provide a copy.			
	Yes	No	Did you pay or receive alimony in 2024?	Recipient's SSN	Date of divorce or separation	
			Paid	Received	\$	
	Yes	No	Did you purchase health insurance through a public exchange/marketplace? (Provide Form 1095-A.)			
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?			
	Yes	No	Did you pay anyone for domestic services (e.g., nanny, housekeeper, cook, caretaker) in your home?			
	Yes	No	Did you purchase an energy-efficient, hybrid, or electric vehicle?			
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?			
	Yes	No	Are you a member of the military?	State of residency		
	Yes	No	Were you a citizen of or did you live in a foreign country?	Foreign country		
	Yes	No	Do you own or have financial interest in a foreign bank or financial account? Maximum value in 2024 \$			
CHILDREN & EDUCATION	Yes	No	Would you like to allow your tax preparer or another person to discuss your return with the IRS?			
			Designee's name	Phone number	PIN (any five digits)	
	Yes	No	Were any children born or adopted in 2024? (Provide statement for other expenses.)			
	Yes	No	Were any children attending college? (Provide Form 1098-T and Form 1098-E.)			
			Year in college	Paid by you: Tuition \$	Books \$	Student loan interest \$
				Paid by student: Tuition \$	Books \$	Student loan interest \$
	Yes	No	Did you pay any tuition for a private school for a dependent or take classes yourself?			
			Student		Amount paid \$	
			Name and address of school			
	Yes	No	Did you pay for child or dependent care so you could work or go to school? (Provide statement if applicable)			
			Name of provider		EIN or SSN	
			Address		Amount paid \$	
Yes	No	Did you make any contributions to a 529 plan in 2024? If yes, provide details.				
INVESTMENTS	Yes	No	Did you, or will you, contribute any money to an IRA for 2024?	Traditional IRA	Roth IRA	
	Yes	No	Did you roll over any amounts from a retirement account in 2024?			
	Yes	No	Did you sell or transfer any stock or sell rental or investment property?			
	Yes	No	Did you receive any income from an installment sale?			
	Yes	No	Did you have any investments become worthless or were you a victim of investment theft in 2024?			
	Yes	No	Were you granted, or did you exercise, any employee stock options during 2024?			
	Yes	No	Did you (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (Digital assets include cryptocurrencies, NFTs, and stablecoins)			
DEDUCTIONS	Yes	No	Did you, or do you plan to, contribute money by April 15, 2025 to an HSA for 2024? If yes, provide details.			
	Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.			
	Yes	No	Did you pay sales taxes on a major purchase in 2024, such as a vehicle, boat, or home?			
	Yes	No	Did you make any charitable contributions in 2024? If yes, provide details.			
BUSINESS	Yes	No	Did you work from a home office or use your car for your business?			
	Yes	No	Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)?			
	Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?			
HOME	Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement.			
	Yes	No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.			
	Yes	No	Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement.			
	Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?			
	Yes	No	Did you make any new energy-efficient improvements to your home? If yes, provide details.			

State information	Full-year resident	Part-year resident	Nonresident	School district
States of residence during 2024 and dates	Do you rent or own your home?		Rent	Own
	Total rent paid \$	Includes heat?	Yes	No