2024	1040	US	Miscellaneous Questions

**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	
☐	☐	Did your marital status change during the year?
☐	☐	Did your address change during the year? If you moved to a different **state, please provide the move date for you (and your spouse if different)**.
☐	☐	Could you be claimed as a dependent on another person's tax return for 2024?

DEPENDENTS

Yes	No	
☐	☐	Were there any changes in dependents? If additions, please provide name, DOB, SSN and relationship.
☐	☐	Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of 2024?
☐	☐	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

Yes	No	
☐	☐	Did you and your dependents have healthcare coverage for the full-year?
☐	☐	Did you receive IRS Form 1095-A, 1095-B or 1095-C? **If yes, please attach.**

INCOME

Yes	No	
☐	☐	Did you receive unreported tip income of $20 or more in any month?
☐	☐	In the course of your business, did you receive payments for goods and/or services totaling over $5,000 via credit card or a third-party payment processor (e.g. CashApp, PayPal, Square, Stripe, Venmo, etc.) **If yes, please provide 1099-K, if received.**
☐	☐	Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?
☐	☐	Did you **start receiving** Social Security benefits during 2024?

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Yes	No	
☐	☐	Did you receive any disability or unemployment income?
☐	☐	Did you have any foreign income or pay any foreign taxes?
☐	☐	Were you granted any stock options (RSU or PSU) or did you exercise any stock options (ISO, NQ, ESPP)? **If yes, please provide your final year-end pay stub dated in the year ended December 2024, along with any documents pertaining to the grant or exercise.**
		PURCHASES, SALES AND DEBT
☐	☐	Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?
☐	☐	Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.), or convert any personal assets to business use?
☐	☐	Did you buy or sell any stocks, bonds or other investment property in 2024? Please provide your year-end 1099 forms and specify the sale of any collectibles (e.g., artwork, gems, stamps, coins) and any qualified small business stock.
☐	☐	Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? Please provide **final** Settlement/Closing Disclosure Statement.
☐	☐	Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources? **If yes, please provide the installation contract, including date, address, and cost of installation.**
☐	☐	Did you have any debts cancelled or forgiven?
☐	☐	Did anyone owe you money which had become uncollectible?
		RETIREMENT PLANS
☐	☐	Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
☐	☐	Did you receive a distribution from a retirement plan that was subsequently rolled over into another retirement account within 60 days of receiving the distributions?
☐	☐	Did you take Qualified Charitable Distributions (QCD) from your IRA in 2024? **If yes, please provide any supporting documentation**. Identify these contributions seperately from other Charitable Donations.

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Yes	No	
☐	☐	Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)?
☐	☐	Did you transfer or rollover any amount from one retirement plan to another retirement plan? **If yes, please provide 1099-R from the distributing custodian.**
☐	☐	Did you convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2024? **If yes, please provide related 1099-R**
☐	☐	Are you interested in making a retirement plan contribution if eligible?
☐	☐	Did either you or your spouse **attain the age of 72 during the year? If so, did you take a Required Minimum Distribution during the year?**
☐	☐	**Are you retired, and do you have your health insurance or long term care insurance premiums deducted from your retirement distributions (other than social security)? If yes please provide a year-end pay stub.**
		EDUCATION
☐	☐	Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program? **If so, please provide 1099-Q.**
☐	☐	Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? **If so, please provide 1098-T.**
☐	☐	Did you pay interest on a higher education loan? **If so, please provide 1098-E.**
☐	☐	Did you incur any expenses working as a teacher, counselor, or principal for classes kindergarten through grade 12?
		ITEMIZED DEDUCTIONS
☐	☐	Did you purchase any motor vehicles or boats in 2024? **If so, please provide a copy of the purchase contract and the dealer issued Form 15400, if an electric vehicle**.
☐	☐	Did you incur a loss because of damaged or stolen property?
☐	☐	Did you work out of town for part of the year?
☐	☐	Did you use your car on the job (other than to and from work)?
☐	☐	Did you pay any investment management fees in 2024?

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ESTIMATED TAXES

Yes	No	
☐	☐	Did you apply an overpayment of 2023 taxes to your 2024 estimated tax (instead of being refunded)?
☐	☐	If you have an overpayment of 2024 taxes, do you want the excess applied to your 2025 estimated tax (instead of being refunded)?
☐	☐	Do you expect your 2025 taxable income and withholdings to be different from 2024?

MISCELLANEOUS

Yes	No	
☐	☐	Would you like to have any refunds directly deposited into your bank account? Direct deposit may speed up your refund by 1 to 2 weeks.
☐	☐	Did your bank account information change within the last twelve months? **If your account information changed or you have not previously utilized direct deposit please provide us with a voided check. If no change, please confirm the last 4 digits of your account.**
☐	☐	Did you pay or receive alimony during the tax year?
☐	☐	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 bring anything into California without paying sales tax (either through travel or online purchases)?
☐	☐	**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?**
☐	☐	Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or did you have an interest in any foreign assets or accounts?
☐	☐	Did you receive, sell, exchange, gift or otherwise dispose of any financial interest in **Virtual Currency (Bitcoin, etc)** during the year? **If so, please provide any 1099's or report of transactions or spreadsheets detailing the nature of the transactions. Detail should include purchase and sale dates, cost basis and sales price.**
☐	☐	Was your home rented out or used for business?

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Yes	No	
☐	☐	In the course of operating a business or rental property in 2024, did you pay over $600 to an attorney or to a service provider that is not a Corporation? Have you filed the appropriate 1099 forms, if required?
☐	☐	Did you (or someone on your behalf, including your employer) make contributions to a health savings account (HSA) this year? Or, did you receive an HSA distribution or acquire an interest in an HSA due to the death of the account beneficiary? Please enclose any Forms 1099-SA or 5498-SA.
☐	☐	Did you have a medical savings account (MSA), a Medicare + Choice MSA, or acquire an interest in an MSA or a Medicare + Choice MSA because of the death of the account holder? Or, 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?
☐	☐	If you, or your spouse, have self-employment income, did you pay any health insurance premiums or long-term care premiums?
☐	☐	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?
☐	☐	Did you pay any household employees over age 18 wages of $2,700 or more?
☐	☐	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?
☐	☐	Are you interested in an income tax planning appointment during the summer?
☐	☐	Are you interested in hearing about our Wealth Management services?
☐	☐	Are you interested in estate planning services?
☐	☐	Are there any other services you are interested in?
☐	☐	Is there any way we can improve our services? Please let us know.