

2024 Personal Income Tax Return Questionnaire

Please complete this form for Tax Kingz & Associates so that we can expedite the completion of your tax documents.

GENERAL INFORMATION (Update as applicable)

- Full legal name: Taxpayer Spouse
- 1) Telephone: Home Cell
- 2) Email address(es):
- 3) Mailing address:
- 4) What is your occupation? Taxpayer Spouse
- 5) Has your marital status changed? No Yes Describe
- 6) Date of birth: Taxpayer Spouse
- 7) Have your dependents changed? No Yes
- 8) Names & Birthdates of Dependents
- | | |
|---------|-----------|
| a) Name | Birthdate |
| b) Name | Birthdate |
| c) Name | Birthdate |
| d) Name | Birthdate |
- 9) Check if any of your children have investment income over \$1300 who are (1) under age of 18 as of 12/31/2024 or (2) under the age of 24 and are a full time student

INCOME

10) Check if you received any of the following income: if checked, please provide documents

	a. Salaries, Wages & Gambling Winnings	Provide W-2 Forms/W-2 G's
	b. Taxable or tax-exempt interest income	Provide 1099-Int or list payer and amounts
	c. Dividend Income	Provide 1099-Div or list payer and amounts
	d. Capital gains or losses	Provide 1099-B Brokerage statement (please review for costs basis)
	e. Sch C/Sch E Business or rent income, Royalties	Provide income and list of expenses
	f. Real estate sale	Provide 1099-S, provide settlement statement, cost basis
	g. Pension or annuity	Provide 1099-R
	h. Traditional IRA or Roth IRA	Provide 1099-R, if applicable, indicate the total Qualified Charitable Distributions paid directly from the IRA.
	i. Social Security	Provide SSA-1099
	j. State income tax refund(s) and/or State unemployment Compensation	Provide 1099-G
	k. Alimony received	Provide amount received & date of divorce agreement
	l. 529 College Savings Plan Distribution	Provide 1099-Q; indicate the amount used for Qualified Higher Education expenses
	m. Health Savings Account Distributions	Provide 1099-SA; indicate the amount used for Qualified Medical Expenses
	n. Business – other investments	Provide Schedule K-1's from 1065's, 1120-S's, 1041's
	o. 1099-NEC	Any Independent Contractor work
	p. 1099-K (e-commerce)	PayPal, Venmo, Zelle & eBay sales
	q. 1099-Misc.	Rent, & or Royalty income
	r. Other	Provide details

ADDITIONAL INFORMATION

11. Do you have an interest in or signature authority over a foreign bank account, foreign securities account, or other foreign financial account? No Yes

12. Do you have any foreign trusts? No Yes

13. At any time during 2024, did you: (a) receive (as a reward, award, or payment for property or services); or (b) Sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? Describe

DEDUCTIONS

14. Did you make, or will you be making, any payments to an individual Retirement Account (IRA), Simplified Employee Pension (SEP), or other qualified retirement plan? Yes No

If yes, how much? \$

Type of plan:

Date of payment:

15. Medical and dental expenses;

Doctors, dentists, nurses, nursing homes, hospitals, eyeglasses, & prescriptions: \$

Medical transportation: \$ Or auto mileage

Health Savings Account Contributions (Provide 5498-SA Form);

Self: \$

Family: \$ \$

Long-Term care insurance: Taxpayer \$

Spouse \$

16. Charitable contributions: Cash or Check \$

List details:

17. Deductions/Credits (Provide an attachment with details for any figures listed below):

* Loss by casualty or theft related to a federally declared disaster only \$

* Alimony paid \$

Recipient's SSN

Date of original divorce

* College or vocational school tuition: \$
Form 1098-E)

(Provide 1098-Tuition statement or student loan interest

* Childcare: \$

Providers Name:

Providers Address:

SSN or EIN:

* Elementary & secondary school teacher unreimbursed classroom supply expenses: \$

* Check if geothermal, solar, small wind energy property, or a high-efficiency biomass fuel stove was installed in home and provide receipts of qualifying improvements

* Check if a new plug-in electric drive vehicle was acquired during the year and provide buyer's order and all supporting documents

* For business related vehicle expenses, please provide the following:

- a. Vehicle Description:
- b. Date Purchased:
- c. Mileage;
 - i. Business:
 - ii. Commuting:
 - iii. Other / Personal:
- d. Written Evidence? No Yes

* Gambling losses to extent of gambling winnings: (i.e. Statement of play from casinos) \$

HEALTH CARE

18. Did you, your spouse, and any dependents have health insurance coverage from the Health Insurance Marketplace (Exchange)? No Yes If yes, provide all 1095-A forms.

ESTIMATED TAX PAYMENTS

19. List the dates and amounts of estimated tax payments

	<u>Federal Date</u>	<u>Federal Amount</u>	<u>State Date</u>	<u>State Amount</u>
Paid with extension of 2023 tax return				
Balance due on 2023 tax return				
4 th quarter 2023 estimate due 1-15-24				
1 st quarter 2024 estimate due 4-15-24				
2 nd quarter 2024 estimate due 6-15-24				
3 rd quarter 2024 estimate due 9-15-24				
4 th quarter 2024 estimate due 1-15-25				

20. Please provide a copy of Driver's License for taxpayer and spouse (used for e-filing).

21. Do you want us to prepare estimated tax payments for next year? If No Yes
yes, do you expect a large fluctuation in your income, deductions or
withholdings for Tax Year 2025? No Yes

OTHER MATTERS

22. Check if you received a federal or state income tax notice (provide copy of notice):

23. Check if you made any gifts this year to any one individual in excess of \$18,000 or to a trust in any amount:

List Details:

24. Check if you paid any cash wages during the year to a household employee:

25. Please describe any other matters which you believe affect your income tax:

Based upon the information you provide us; we will prepare your Federal and applicable State income tax returns for 2024.

We will not audit or verify the data you submit to us, although we may ask you for clarification when necessary. All the information you submit to us will, to the best of your knowledge, be correct and complete and include all the information necessary for the completion of your tax return(s).