

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Best time to Call: \_\_\_\_\_

1) Any change in Marital Status or Dependents YES NO

2) New Driver's License - Provide a Copy YES NO

3) You/spouse have an Identity Protection Pin YES NO

4) Move/Buy/Sell/Refinance your Home YES NO

Provide: Settlement Sheet & Date Moved

5) Did you/spouse have a financial interest in or signature authority over a financial account (bank, brokerage)

located in a foreign country? YES NO

6) At any time, did you/spouse: (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)? YES NO

7) Do you want direct deposit to the same bank account that we have on file? YES NO If new bank, provide:

Bank Name: \_\_\_\_\_  Checking  Savings

Routing # \_\_\_\_\_ Account # \_\_\_\_\_

## INCOME

8) Wages Income **Form W2** YES NO

9) Any Tips not reported on your W-2 YES NO

10) Social Security **Form 1099-SSA** YES NO

11) Retirement or IRA withdraw **Form 1099-R** YES NO

In 2024 Required Minimum Distributions begin at age 73

12) Convert an IRA to a ROTH – Statements YES NO

13) Trust, Partnership, S-Corp Income **Form K-1** YES NO

14) Receive Interest, Cash-in Bonds **1099-INT** YES NO

15) Dividends **1099-DIV** or Sell Stocks **1099-B** YES NO

16) Solar or Geo-Thermal SREC Income YES NO

17) Any Grant or Scholarship Income YES NO

18) Unemployment **Form 1099-G** YES NO

19) Jury Duty Income YES NO

20) Election Judge Income YES NO

21) Alimony Paid or Received YES NO

22) Receive an Inheritance (you might get a **K-1**) YES NO

23) Cancellation of Debt **Form 1099-C** YES NO

24) Gambling Winnings **Form W-2G** YES NO

25) Any Side Hustle / Hobby Income YES NO

26) Start a Business in 2024 YES NO

Did you Incorporate or Open an LLC in 2024 YES NO

Did you file the BOI <https://fincen.gov/boi> YES NO

27) Receive **Form 1099-MISC** or **Form 1099-NEC** YES NO

28) Receive Money via an App **Form 1099-K** YES NO

VENMO, Cash App, PayPal, eBay, Stripe, Etsy, etc...

Did you resell any tickets ie. Ravens YES NO

If you sold items please provide the cost of the items sold

29) Rent out your Home or Another Property YES NO

30) Receive Funds from a Lawsuit/Settlement YES NO

31) Any Foreign Income from outside the USA YES NO

## DEDUCTIONS & CREDITS

32) Contribute to an IRA or ROTH - Statements YES NO

33) Contribute to 1<sup>st</sup> Time Homebuyers Account YES NO

34) Contribute to a 529 Plan - Statements YES NO

Withdraw from 529 Plan – Statement YES NO

35) Contribute to ABLE Account – Statements YES NO

36) Contribute to HSA (Health Savings Account) YES NO

Distributions from HSA **Form 1099-SA** YES NO

37) Educator/Teacher Classroom Expenses YES NO

max \$300 for expenses for K thru 12 must work 900 hrs yr

38) Paid on Student Loans **Form 1098-E** YES NO

39) Adopt a Child – Detailed list of expenses YES NO

40) Union Dues Paid – Provide: YTD Paystub YES NO

41) Are you a retired Correction or Public Safety Officer

YES NO From a State of Maryland Employer YES NO

42) Are you a Volunteer Fire/Rescue/Ambulance YES NO

43) Mortgage Interest Paid **Form 1098** YES NO

44) 2<sup>nd</sup> Home/RV/Boat Mortgage Interest Paid YES NO

45) Property Taxes Paid YES NO

46) Personal Property Tax Paid (VA, CT, MI, RI) YES NO

47) Charitable Contributions IRS Search tool to verify tax

exempt status: <https://apps.irs.gov/app/eos/> YES NO

Provide: Receipts/Letter with Date, Amount Paid

48) Excessive Medical Expenses Paid YES NO

Must itemize and expenses are in excess of 7.5% of AGI

49) Does everyone have health care coverage YES NO

Health Insurance from Marketplace **1095-A** YES NO

Do you authorize sharing your tax information with the Maryland Health Exchange? YES NO

50) Long-Term Care Insurance Paid - statements YES NO

51) Daycare Expenses Paid - Need statements YES NO

52) College Tuition Expenses Paid **Form 1098-T** YES NO

Provide: Statements for Tuition, Housing, & Books Paid.

Student Name: \_\_\_\_\_ Full-Time or Part-Time

53) Purchase an Electric Vehicle YES NO

Provide: Year, Make, Model, VIN, Date Placed in Service

Purchase Electric Vehicle Charger - invoice YES NO

54) Energy-Efficient Improvements YES NO

Provide: Detailed Invoices <https://www.Energystar.gov>

Insulation, windows, exterior doors, home energy

audit of a main home, central A/C, furnace, boiler,

heat pump, bio mass stove, water heater, heat pump

water heater, geothermal, solar, wind

55) Pay 2024 Estimated Taxes YES NO

For each payment provide: Paid To, Date Paid, Amount

56) Give a Gift of \$18,000 or more to a person? YES NO

Provide: Donee Name, Relationship, Address & Amount