

# 2024 TAX CHECKLIST & QUESTIONNAIRE

Please check here if all names, SSN, DOB, etc. (all shaded areas) stayed the same in 2024.

Name:	SSN:	DOB:	Occupation:
Primary Taxpayer:			
Secondary Taxpayer:			
Current Mailing Address:	Primary Phone:	Cell Phone:	Other:
	Primary Email Address:		
	Secondary Email Address:		

**Proof of identity is required such as a driver's license or state-issued photo ID to e-file.**

Expected Filing Status for 2024:	Other Information:	Primary:	Secondary:
<input type="checkbox"/> Single (S)	Are you blind or disabled?	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> Married Filing Jointly (MFJ)	Are you a full-time student?	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> Married Filing Separately (MFS)	Contribute \$3 Election fund?	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> Qualifying Surviving Spouse (QSS)	Did you file taxes in 2023?	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> Head of Household (HOH)			

Did your marital status change due to divorce, separation, death of a spouse, etc. in 2024?  Yes

Can you or your spouse be claimed as a dependent on someone else's tax return?  Yes

If so, have you or your spouse been claimed as a dependent on someone else's tax return?  Yes

Did you move or did your address change during the year?  Yes

Were you, your spouse, or any dependents ever a victim of identity theft?  Yes

Were you, your spouse, or any dependents ever issued an Identity Protection PIN (IP PIN)?  Yes

**If "Yes," provide Notice CP01A from the IRS for each party affected.**

Do you want your refund direct deposited into a checking or savings account?  Yes

**If "Yes", please provide VOIDED CHECK or deposit slip.**



## DEPENDENT / QUALIFIED CHILDREN:

Name:	SSN:	Birthdate:	Age:	Relationship:	Mos. In Home:	College Student:	Dependent's Gross Income:
						Yes	
						Yes	
						Yes	

If you alternate claiming a non-custodial child every-other-year on your tax return, do you have an  Yes

**IRS Form 8332 – Release of Claim of Exemption of Child by Custodial Parent** signed and on file.

Can another person **QUALIFY** to claim any of your dependents in 2024?  Yes

Did you pay any qualified childcare expenses to a licensed daycare provider during 2024?  Yes

Did you provide over half the support for any other person during 2024?  Yes

Do you have dependent care expense covered through work or through an employee contribution program?  Yes

Do you have any dependent children who must file a 2024 Federal or State tax return?  Yes

*As a courtesy, dependent children's tax returns are prepared free of charge.*

**TAXABLE INCOME: (Please check "✓" all that apply)**

- Wages, salary, tips, etc. (W-2s)
- Disability income (W-2)
- Tips not reported on W-2s
- Lyft, Uber, Airbnb, VRBO, etc. (1099-K or NEC)
- Taxable Interest (1099-INT, Bank Statements)
- Dividend income (1099-DIV)
- IRA withdrawals, rollover, or transfer (1099-R)
- Pension income (1099-R)
- Annuity income, payments, or transfer (1099-R)
- Social Security Benefits (1099-SSA)
- Cancellation of debts (1099-C)
- Non-employee compensation (1099-NEC)
- Home or real estate sale (1099-S)
- Sale or transaction of any crypto, digital or virtual currency**
- Foreign income or taxable investments
- Maintain foreign accounts or transactions
- Business or hobby income / loss (Schedule C)
- Gains on investments, land, etc. (1099-COMP)
- Rental property income (Schedule E)
- Partnership income (K-1)
- Estate or trustee income (K-1)
- Unemployment Compensation (1099-G)
- Gambling / lottery winnings (W-2G)
- Distributions from education accounts (1099-Q)
- Jury Duty income
- Other: \_\_\_\_\_

**ADJUSTMENTS TO INCOME / Tax: (Please check "✓" yes or no to each question)**

- Did you incur any expense as a direct result of teaching (Educator Expense Deduction)?  Yes
- Did you own a Health Savings Account (1099-SA) individually or through work?  Yes
- Did you move as a member of the Armed Forces in 2024 (Moving Expense Deduction)?  Yes
- Did you contribute to a SEP, SIMPLE or other self-employed qualified plan in 2024?  Yes
- Did you withdraw funds from an IRA, 401(k), etc. prior to 59½ (Early Withdrawal Penalty)?  Yes
- Did you contribute to an Individual Retirement Account (IRA) or Roth IRA in 2024?  Yes
- If "Yes", amount contributed: Taxpayer: \_\_\_\_\_ 2<sup>nd</sup> Taxpayer: \_\_\_\_\_
- Did you pay interest on a student loan (Student Loan Interest Deduction)?  Yes
- Did you receive a Health Insurance Marketplace Statement (1095-A) in 2024?  Yes
- Did you pay estimated taxes in 2024?  Yes
- If yes, amount paid: 1<sup>st</sup> Quarter: Fed: \_\_\_\_\_ St: \_\_\_\_\_ 3<sup>rd</sup> Quarter: Fed: \_\_\_\_\_ St: \_\_\_\_\_
- 2<sup>nd</sup> Quarter: Fed: \_\_\_\_\_ St: \_\_\_\_\_ 4<sup>th</sup> Quarter: Fed: \_\_\_\_\_ St: \_\_\_\_\_
- Did you make a Qualified Charitable Distribution (QCD) in 2024?  Yes
- If yes, amount of QCD: \_\_\_\_\_ From which financial institution did the QCD occur? \_\_\_\_\_

**ITEMIZED TAX DEDUCTIONS: (Please check "✓" all that apply)**

*Please note, the standard deduction for 2024 is \$14,600 for single filers and \$29,200 for joint filers under age 65.*

- Medical and Dental Expenses (> 7.5% AGI) \_\_\_\_\_
- Health Insurance / Medicare \_\_\_\_\_
- Long-Term Care Insurance \_\_\_\_\_
- State and Local Taxes \_\_\_\_\_
- New Motor Vehicle or Boat Sale Tax \_\_\_\_\_
- Real Estate Property Taxes \_\_\_\_\_
- Home Mortgage Interest / Points Paid \_\_\_\_\_
- Mortgage Insurance \_\_\_\_\_
- Donations to Charity (Documented) \_\_\_\_\_
- Casualty or Theft Losses \_\_\_\_\_
- Other: \_\_\_\_\_

Did you itemize your tax deductions last year?  Yes  No

**TAX CREDITS & MISC.: (Please check "✓" yes or no to each question)**

- Did you install a geothermal, solar, or wind energy system in your primary residence in 2024?  Yes
- Did you make energy efficiency improvements to your primary residence in 2024?  Yes  
If so, please list the amount of energy credits used (if any) prior to 2024? \$ \_\_\_\_\_
- Did you adopt a child in 2024 or have adoption credit carried over from 2023?  Yes
- Did you pay education tuition and fees for you, your spouse or dependent child in 2024?  Yes  
If so, please provide your Tuition Statement (**1099-T**), receipts for books, etc.
- Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?  Yes
- Did you pay any foreign income or investment tax?  Yes
- Did you contribute to a 401(k), 403(b), Simple IRA or other company retirement plan in 2024?  Yes

**WI STATE RETURN: (Please check "✓" yes or no to each question)**

- Did you purchase / renew a Wisconsin special tax-deductible license plate in 2024?  Yes
- Did you purchase (through internet, etc.) items where Wisconsin sales tax is due but not paid?  Yes
- Did you work in or receive income from another state other than Wisconsin?  Yes
- Did you pay state income tax to another state other than Wisconsin in 2024?  Yes
- Did you pay rent in 2024?  Yes  
Amount paid with heat **NOT** included: \_\_\_\_\_  
Amount paid with heat included: \_\_\_\_\_
- Did you pay Wisconsin state property tax for anyone other than yourself?  Yes
- Did you receive the Wisconsin Homestead Credit in 2023 or expect to receive the credit in 2024?  Yes
- Did you pay Medicare, MedAdv, Long-Term Care, Prescription Drug premiums in 2024?  Yes
- Did you pay in-state college tuition for yourself or a dependent in 2024?  Yes
- Did you contribute to Wisconsin's 529 College Savings Program (Tomorrow's Scholar or EdVest in 2024)?  Yes
- Did you pay private K-12 tuition for a dependent child in 2024?  Yes

**OTHER: (Please check "✓" yes or no to each question)**

- Were you ever audited or received any correspondence by the IRS?  Yes
- Were you ever delinquent in paying your taxes or ever modified your tax return after it was filed?  Yes
- Did you or your spouse make or receive gifts of over \$16,000 in 2024?  Yes
- Did you turn 73 prior to December 31st of 2024 (RMD)?  Yes

**2025 TAX PLANNING: (Please check "✓" yes or no to each question)**

- Do you expect your income, withholdings or other financial to change in 2025?  Yes
- Will you file bankruptcy, have any lender forgive / cancel debts (credit cards, etc.) in 2025?  Yes
- Do you and / or your spouse plan to retire or have significant life / income changes in 2025?  Yes
- Do you expect to undergo any major-medical expenses in 2025?  Yes
- Do you expect to file bankruptcy, foreclose, or have any debt forgiven or cancelled in 2025?  Yes
- Will any dependent children turn 17 and NOT be entering college or vocational school in 2025?  Yes
- Do you anticipate having to begin taking an RMD from your retirement account in 2025?  Yes

**REQUIRED DOCUMENTATION NEEDED TO COMPLETE YOUR TAX RETURNS:**

- \_\_\_\_\_  \_\_\_\_\_
- \_\_\_\_\_  \_\_\_\_\_