

MM Tax Service, Inc.

—María A. Miguel, E.A.—

2024 CLIENT QUESTIONNAIRE

Personal Information

Taxpayer & Spouse Name: _____

	Taxpayer:	Spouse:
Email:	_____	_____
Phone:	_____	_____

Is your address the same as last year?

☐ Yes ☐ No *(if no, please provide your current address)*

Address: _____

City: _____ State: _____ Zip: _____

Are you claiming the same dependents as last year?

☐ Yes ☐ No ☐ N/A *(if no, please list the dependents you are claiming)*

Name:	SSN:	Birthdate:	Relationship:
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

- List SSN, Birthdate & Relationship only if new dependent (or you are a new client)

☐ Check here if you are a new client and provide your SSN and birthdate.

	Taxpayer:	Spouse
SSN:	_____	_____
Birthdate:	_____	_____

Tax Refunds

☐ Check here if you would like any tax refund(s) deposited directly into your bank account and check one option:

☐ A voided check or the necessary bank account details will be provided

☐ Bank account is the same as last year

☐ Bank Name: _____ ☐ Checking or ☐ Savings

Routing Number: _____

Bank Account Number: _____

Tax Payments

If you owe tax for 2024, how would you like to pay the amount(s) due?

- ☐ I will pay online (*instructions will be supplied in your letter*)
- ☐ Pay by Check (*payment vouchers to mail with your check will be provided*)
- ☐ Please have the payments automatically withdrawn from my bank account on the due date. Please check one option:
 - ☐ A voided check or the bank account details will be provided
 - ☐ Bank account is the same as last year
 - ☐ Bank Name: _____ ☐ Checking or ☐ Savings
 - Routing Number: _____
 - Bank Account Number: _____

If we set up estimated (quarterly) taxes for you for 2024, did you pay them as instructed per our letter?

- ☐ Yes ☐ No (*if no, please supply date & amount of each payment made*)

If you owe estimated (quarterly) taxes for 2025, how would you like to pay them?

- ☐ I will pay online each quarter (*instructions will be supplied in your letter*)
- ☐ Pay by Check (*payment vouchers to mail with your check will be provided*)
- ☐ Please have each payment automatically withdrawn from my bank account on the due date. Please check one option:
 - ☐ A voided check or the bank account details will be provided
 - ☐ Bank account is the same as last year
 - ☐ Bank Name: _____ ☐ Checking or ☐ Savings
 - Routing Number: _____
 - Bank Account Number: _____

Required Tax Return Questions

At any time during 2024, did you have a financial interest in or signature authority over a financial account located in a foreign country?

- ☐ Yes ☐ No

At any time during 2024, did you (a) receive (as a reward, award, or payment for property or service; or (b) sell, exchange or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

- ☐ Yes ☐ No

Did you or your family have health insurance for any part of 2024 through the Healthcare Exchange (Marketplace)?

- ☐ Yes ☐ No (*If yes, we NEED your Form 1095-A to complete your tax return*)

IMPORTANT - Signatures & Tax Return Copies

You (and your spouse, if married) are required to review your tax return and sign an authorization before we can electronically file your tax returns. Please indicate below how you would like to sign the necessary documents and receive your tax return copy:

- ☐ Electronically* (*if married, we need both spouse's email addresses*)
☐ Paper Copy (choose one): ☐ Mail ☐ Pick Up

Commonly Missed Items

Indicate if any of the following occurred in 2024 and provide documents (or details, if documentation isn't available) with your tax information:

- ☐ Rent Paid for Residence (Wisconsin Residents)
- ☐ Bought or Sold Home
- ☐ Change in Marital Status
 - ☐ Name changed with Social Security Administration
- ☐ Made gifts of over \$18,000 to any individual
- ☐ Received Unemployment Income
- ☐ You are claimed as someone else's Dependent
- ☐ Pay for Dependent Care Services
- ☐ Received notices from the IRS or State tax agencies
- ☐ Received Lottery or Gambling winnings
- ☐ Received income as Beneficiary of an Estate or Trust
- ☐ Paid College Tuition
- ☐ Paid Private School Tuition (Wisconsin)
- ☐ Contributed or Withdrew from Edvest Account (Section 529 Plan)
- ☐ Made Energy Efficient Improvements to home
- ☐ Are an Educator and had qualified Expenses used in Classroom

Questions & Comments

Questions/Comments - you can either email us or use the space below to let us know if there is anything you would like us to know or that you would like to discuss regarding THIS tax return. We will contact you when we start working on your tax return, if needed. Questions/discussions involving future tax years can be directed to us after the tax season.

[illegible]