ROTH TAX PREPARATION FORM - 2024

Filing Status	
Single	
Head of Household	
Married Filing Separate	
Married Filing Joint	

- Only if you are unmarried with dependent and provide at least 50% of financial support

PERSONAL INFO	SPOUSE'S PERSONAL INFO
Name (Last, First, Middle Init.)	Name (Last, First, Middle Init.)
Social Security Number	Social Security Number
Date of Birth (mm/dd/yy)	Date of Birth (mm/dd/yy)
Occupation	Occupation

CONTACT INFO	
Street Address	
Apt. #	
City	
State	
Zip Code	

CONTACT INFO	for Spouse that resides separately
Street Address	
Apt. #	
City	
State	
Zip Code	

Can you be claimed a dependent on another's tax return? (ie: parent)

You

Yes

No

Yes

No

2024 RESIDENCY	
State of residency Dec.31, 2024	
If you moved, from what state?	
If so, what date did you move?	

DEPENDENTS					
First Name	Last Name	Date of Birth	Social Security #		Tuition Expenses Total for that particular dependent (Itemize in the Chart Below)

Institution or Cargiver Name	Address	SSN or EIN (Mandatory Info)	Expense
		Total	

MPLYMENT QUARTERLY ESTIMATED TAX PAYMENTS MADE FOR 2024					
TDC	St	State		Additional State or NYC	
IKS	Which State Paid		Which State Paid		
Amount	Date Paid	Amount	Date Paid	Amount	
	IRS	IRS St Which State Paid	IRS State Which State Paid	IRS State Additional Which State Paid Which State Paid	

BANK INFO (For direct deposit or tax owed)			
Bank Name			
Type of Account	Checking	Savings	
Routing Number			
Account Number			

ITEMIZED DEDUCTIONS	
Medical Expenses - Note that if your medical expenses don't exceed 7.5% of your income it won't be deducted	
Prescription Medicines & Drugs	
Doctors, Dentists, Nurses, Chiropractor, Mental Therapy, Eye related expense, etc.	
Hospitals & Nursing Homes	
Health Insurance Premiums through Employer Group Plan - Taxpayer's portion	
Health Insurance Premiums through Employer Group Plan - Spouse's portion	
Health Insurance Premiums Paid Privately not through an Employer Group Plan - Taxpayer's portion	
Health Insurance Premiums Paid Privately not through an Employer Group Plan - Spouse's portion	
Total	
Taxes You Paid - You may leave this section blank if you provide me with your 1098 from your bank	
Real Estate Taxes (primary home)	
Real Estate Taxes (secondary home)	
Personal Property Taxes (ie: automobile)	
Total	
Interest You Paid - You may leave this section blank if you provide me with your 1098 from you bank	
Mortgage Interest (primary home)	
Points (primary home)	
Mortgage Interest (secondary home)	
Points (secondary home)	
Coop Interest on Underlying Mortgage - Coop's management's accountants will provide a shareholder letter in Jan.	
Mortgage Insurance Premium (usually in box 4 on your 1098)	
Total	
Gifts To Charity	
Made by Credit Card, Cash or Check	
Other than Cash or Check (ie:item donations to Goodwill, etc) if over \$500 total you MUST provide RECEIPTS from donation sites.)	
Total	

Please list your business activity?	Taxpayer	Spous
Professional Fees	Promotion Supplies	-
_egal	Website	
Accounting/Bookkeeping	Resume, Headshot, Other Promotional Materials	
Tax Preparer	Advertising	
Agent/Manager Fees NOT related to w2 jobs	Demos	
Agent/Manager Fees related to w2 jobs	Postage & Mailing Supplies	
Pay to Contracted Workers - Incl. Submitted 1099s	Office Supplies	
Professional Dues/Work Dues	Artistic Performance Specific Expenses	
Professional Dues NOT RELATED to w2 Work	Hair & Makeup	Γ
Professional Dues RELATED to w2 Work	Trun & riakeap	<u> </u>
	Gifts	
Continued Education	Gifts to Colleagues (\$25 per recipient gift limit)	
Conferences, etc.	Professional Tips NOT associated with w2 jobs	
Other Training Expenses		
	Equipment & Related Expenses	T
Research	Musical Instruments/Tools of trade in Total	
Professional Publications/Sheet Music/Scripts	**Please list all single items over \$500 included in the above TOTAL on the	e next page
Art Event Tickets (shows, concerts, etc)	Electronics/Gear (related to profession) in Total	
Movies	**Please list all single items over \$500 included in the above TOTAL on th	e next page
Video Rentals (ie:Netflix, Hulu, Amazon, etc)	Rent for Equipment Storage	
Music Recordings & Streaming Services	Rent for Rehearsal Space	
Other Research Expenses	Repairs for Instruments	
	Insurance (equipment or instruments)	
Communication & Research Utilities nternet	Food & Entertainment (LOCAL ONLY)	
Zoom, Apple Storage, Dropbox, etc	Business Meals (LOCAL ONLY)	
Felephone	Dusiliess Medis (LOCAL ONLT)	<u> </u>
Cable TV Service (eligible to Actors)	<u> </u>	
	Business Use of Car	
	Date vehicle was purchased (mm/dd/yy) est.	
ransportation (Local Only)	Year & Make of Vehicle	
axis, Buses, Car Rental, etc.	Total miles driven for the year Personal & Biz	
Parking Fees & Tolls	Total miles for only business	

Equipment List of Single Items o	ver \$500	
Instruments, Tools of Trade		
Item Description	Purchase Date	Cost

Electronics (related to professi	on)	
Item Description	Purchase Da	te Cost

Please list your business activity?	Taxpayer	Spous
Professional Fees	Promotion Supplies	-
Legal	Website	
Accounting/Bookkeeping	Resume, Headshot, Other Promotional Materials	
Tax Preparer	Advertising	
Agent/Manager Fees NOT related to w2 jobs	Demos	
Agent/Manager Fees related to w2 jobs	Postage & Mailing Supplies	
Pay to Contracted Workers - Incl. Submitted 1099s	Office Supplies	
Professional Dues/Work Dues	Artistic Performance Specific Expenses	
Professional Dues NOT RELATED to w2 Work	Hair & Makeup	
Professional Dues RELATED to w2 Work		J
	Gifts	
Continued Education	Gifts to Colleagues (\$25 per recipient gift limit)	
Conferences, etc.	Professional Tips NOT associated with w2 jobs	
	Equipment & Related Expenses	
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Professional Publications/Sheet Music/Scripts	**Please list all single items over \$500 included in the above TOTAL on the	e next page
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Video Rentals (ie:Netflix, Hulu, Amazon, etc)	Rent for Equipment Storage	
Music Recordings & Streaming Services	Rent for Rehearsal Space	
Other Research Expenses	Repairs for Instruments	
	Insurance (equipment or instruments)	
Communication & Research Utilities	Food 0 February and (LOCAL ONLY)	
Internet	Food & Entertainment (LOCAL ONLY)	
Zoom, Apple Storage, Dropbox, etc	Business Meals (LOCAL ONLY)	
Telephone Cable TV Service (eligible to Actors)	_	
Cable IV Service (eligible to Actors)	Business Use of Car	
	Date vehicle was purchased (mm/dd/yy) est.	
Transportation (Local Only)	Year & Make of Vehicle	L
Taxis, Buses, Car Rental, etc.	Total miles driven for the year Personal & Biz	

Equipment List of Single Items over	\$500	
Instruments, Tools of Trade		
Item Description	Purchase Date	Cost

Electronics (related to profession)		
Item Description	Purchase Da	ate Cost

Please list your business activity?	Taxpayer	Spouse
Professional Fees	Promotion Supplies	•
Legal	Website	
Accounting/Bookkeeping	Resume, Headshot, Other Promotional Mate	rials
Tax Preparer	Advertising	
Agent/Manager Fees NOT related to w2 jobs	Demos	
Agent/Manager Fees related to w2 jobs	Postage & Mailing Supplies	
Pay to Contracted Workers - Incl. Submitted 1099s	Office Supplies	
Professional Dues/Work Dues	Artistic Performance Specific Expenses	
Professional Dues NOT RELATED to w2 Work	Hair & Makeup	
Professional Dues RELATED to w2 Work		•
	Gifts	
Continued Education	Gifts to Colleagues (\$25 per recipient gift limit)	
Conferences, etc. Other Training Expenses	Professional Tips NOT associated with w2 job	os
•	Equipment & Related Expenses	
Research	Musical Instruments/Tools of trade in Total	
Professional Publications/Sheet Music/Scripts	**Please list all single items over \$500 included in the above TOTA	L on the next page
Art Event Tickets (shows, concerts, etc)	Electronics/Gear (related to profession) in T	
Movies	**Please list all single items over \$500 included in the above TOTA	L on the next page
Video Rentals (ie:Netflix, Hulu, Amazon, etc)	Rent for Equipment Storage	
Music Recordings & Streaming Services	Rent for Rehearsal Space	
Other Research Expenses	Repairs for Instruments	
	Insurance (equipment or instruments)	
Communication & Research Utilities	Food 0 Fotostois as ant (LOCAL ONLY)	
Internet Durantus at a	Food & Entertainment (LOCAL ONLY)	
Zoom, Apple Storage, Dropbox, etc	Business Meals (LOCAL ONLY)	
Telephone	_	
Cable TV Service (eligible to Actors)	Business Have of C	
	Business Use of Car	. 1
Turn an artetian (Larat Out)	Date vehicle was purchased (mm/dd/yy) es	τ.
Transportation (Local Only)	Year & Make of Vehicle	. 1
Taxis, Buses, Car Rental, etc. Parking Fees & Tolls	Total miles driven for the year Personal & B Total miles for only business	IZ
	I lotal mulas tar anky husinasa	

Equipment List of Single Items of	over \$500		
Instruments, Tools of Trade			
Item Description	Purchase	Date	Cost

Electronics (related to profession)		
Item Description	Purchase Da	ate Cost

Please list your business activity?	Taxpayer	Spous
Professional Fees	Promotion Supplies	•
_egal	Website	
Accounting/Bookkeeping	Resume, Headshot, Other Promotional Mat	erials
Tax Preparer	Advertising	
Agent/Manager Fees NOT related to w2 jobs	Demos	
agent/Manager Fees related to w2 jobs	Postage & Mailing Supplies	
Pay to Contracted Workers - Incl. Submitted 1099s	Office Supplies	
Professional Dues/Work Dues	Artistic Performance Specific Expenses	3
Professional Dues NOT RELATED to w2 Work	Hair & Makeup	<u> </u>
Professional Dues RELATED to w2 Work		<u> </u>
	Gifts	
Continued Education	Gifts to Colleagues (\$25 per recipient gift limit)	
Conferences, etc.	Professional Tips NOT associated with w2 j	obs
Research	Equipment & Related Expenses Musical Instruments/Tools of trade in Total	
	·	
Professional Publications/Sheet Music/Scripts	**Please list all single items over \$500 included in the above TO Electronics/Gear (related to profession) in	
Art Event Tickets (shows, concerts, etc) Movies	**Please list all single items over \$500 included in the above TO	
/ideo Rentals (ie:Netflix, Hulu, Amazon, etc)	Rent for Equipment Storage	TAL OIT the flext page
Music Recordings & Streaming Services	Rent for Rehearsal Space	
Other Research Expenses	Repairs for Instruments	
Other Research Expenses	Insurance (equipment or instruments)	
Communication & Research Utilities	Theurance (equipment of metraments)	<u>l</u>
Internet	Food & Entertainment (LOCAL ONLY)	
Zoom, Apple Storage, Dropbox, etc	Business Meals (LOCAL ONLY)	
Felephone	Dusiness Medis (LOCAL ONET)	
Cable TV Service (eligible to Actors)	<u> </u>	
	Business Use of Car	
	Date vehicle was purchased (mm/dd/yy) e	est.
ransportation (Local Only)	Year & Make of Vehicle	
Taxis, Buses, Car Rental, etc.	Total miles driven for the year Personal &	Biz
Parking Fees & Tolls	Total miles for only business	

Equipment List of Single Items over	500	
Instruments, Tools of Trade		
Item Description	Purchase Date	Cost

Electronics (related to professi	on)	
Item Description	Purchase Da	ate Cost

Expenses Away From Hom	e for TA	XPAYER (OV	ERNIGHT S	TAY ONLY &	1099 INCOME (ONLY-NOT W2)
City, State, Country	# of days spent	Lodging Costs	Meal Costs (IRS Per Diem Rate will be Figured for you)	Airfare	Transportation Expense (ie: luggage, rental car, parking, etc)	Per Diem Paid To You
Totals						

Expenses Away From Home for SPOUSE (OVERNIGHT STAY ONLY & 1099 INCOME ONLY-NOT W2)						NLY-NOT W2)
City, State, Country	# of days spent	Lodging Costs	Meal Costs (IRS Per Diem Rate will be Figured for you)	Airfare	Transportation Expense (ie: luggage, rental car, parking, etc)	Per Diem Paid To You
Totals						
iotais						

Rental Property Income

Rental Income Received				
Address of Rental				
Number of Days Rented in 2024				
Number of Days for Personal Use in 2024				
Did you manage the property yourself?	Yes	No		

_	
Expenses	
Advertising	
Association Dues	
Cleaning & Maintenance	
Commissions	
Gardening	
Insurance	
Legal & Professional Fees	
Licenses and Permits	
Management Fees	
Miscellaneous	
Mortage Interest	
Rent Paid	
Painting & Decorating	
Pest Control	
Plumbing & Electrical	
Repairs	
Supplies	
Real Estate Taxes	
Telephone	
Utilities	

2nd Rental Property Income

Rental Income Received				
Address of Rental				
Number of Days Rented in 2024				
Number of Days for Personal Use in 2024				
Did you manage the property yourself?	Yes	No		

Expenses	
Advertising	
Association Dues	
Cleaning & Maintenance	
Commissions	
Gardening	
Insurance	
Legal & Professional Fees	
Licenses and Permits	
Management Fees	
Miscellaneous	
Mortage Interest	
Rent Paid	
Painting & Decorating	
Pest Control	
Plumbing & Electrical	
Repairs	
Supplies	
Real Estate Taxes	
Telephone	
Utilities	

If you conduct a business out of your home you may be elig	ble for a deduction (if you have a de	dicated space)
Total Area of Home (square footage)		
Area Used for Business (square footage)		
Mortgage Interest (I'll compute from Form 1098)		
Property Tax (I'll compute from Form 1098)		
Annual Rent		
Repairs and Maintenance		
Insurance (Homeowners or Renters)		
Utilities (Electricity, Gas, Water)		
	1:1 : : : : : :	
SPOUSE HOME OFFICE DEDUCTION - Only to		•
If you conduct a business out of your home you may be elig	ble for a deduction (if you have a de	dicated space)
Total Area of Home (square footage)		
Area Used for Business (square footage)		
Mortgage Interest (I'll compute from Form 1098)		
Property Tax (I'll compute from Form 1098)		
Annual Rent		
Repairs and Maintenance		
Insurance (Homeowners or Renters)		
Utilities (Electricity, Gas, Water)		
2 LUGAS OFFICE DEDUCTION TO U.S.		
2nd HOME OFFICE DEDUCTION - Those that		
If you conduct a business out of your home you may be elig	ble for a deduction (if you have a de	dicated space)
Total Area of Home (square footage)		
Area Used for Business (square footage)		
AA		
Mortgage Interest (I'll compute from Form 1098)		
Property Tax (I'll compute from Form 1098)		
Annual Rent		
Repairs and Maintenance		
Insurance (Homeowners or Renters)		
Utilities (Electricity, Gas, Water)		

Use the text box below to provide additional information that you didn't find a place for on this prep form. You can leave numbers and descriptions and I will make sure to include that in the preparation of your tax returns.