



# MAJESTIC TAX GROUP

## 2024 Tax Return Questionnaire

### TAXPAYER

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

SSN: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

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

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

Preferred method of contact:

Phone    Email    Text    ☐ Spouse

### SPOUSE

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

SSN: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

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

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

Preferred method of contact:

Phone    Email    Text    ☐ Spouse

### People you want to claim:

### SSN

### Date of Birth

### In college?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Current Address: \_\_\_\_\_

Did you move during the year?      Yes      No      If so, what date? \_\_\_\_\_

Do you have any bank accounts or income overseas?      Yes      No

Did you have any cryptocurrency transactions last year?      Yes      No

Did you make any of the following contributions and if so, how much?

401(k)      403(b)      Traditional IRA \$ \_\_\_\_\_      Roth IRA \$ \_\_\_\_\_      HSA \$ \_\_\_\_\_

Are you expecting a refund or to owe money? If so, how much? \_\_\_\_\_

How do you prefer to pay for your accounting services?

Debit/Credit      Venmo/CashApp      Email      ☐ Cash/Check

When would you like your return filed?

ASAP      March      April      May-June      July-Sept      October      whenever

Other questions/comments/concerns: