

****THIS FORM NEEDS TO BE COMPLETED AND RETURNED WITH TAX DOCUMENTS****

(OR THIS FORM CAN BE COMPLETED AND DIGITALLY SUBMITTED ON OUR WEBSITE)

Are you claiming any dependents in 2024? - IF YES ADDITIONAL SHEET REQUIRED	YES	NO
Did you or spouse receive any unemployment income? If yes, 1099G Required	Yes	No
Did you receive retirement or Social Security benefits? If yes form SSA-1099/1099-R Required	Yes	No
Do you have Medicare? (Social Security health insurance)	Yes	No
Do you have a health insurance you pay out of pocket?(secondary/supplement) Annual Amount _____	Yes	No
Do you have Long Term Health Care policy? (Nursing Home Insurance) Name(s) _____ Cost(per individual) _____	Yes	No
Did you purchase insurance through HealthCare.gov- Market Place? 1095-A Required	Yes	No
Have you received any of the following 1099's: (Forms Required) 1099-R - For distributions from Retirement accounts / including Roll Overs 1099-DIV - From Stock held 1099-INT - Interest Income from Banks, Stocks, ETC	Yes Yes Yes	No No No
QCD - Did you contribute to a Qualified Charitable Distribution - For those over age 70 (forms Required)	YES	NO
Did you have a self employed business?	Yes	No
Have you filed a Schedule C, E or F in previous tax year?	Yes	No
Did you use a credit card processor/Venmo/PayPal/Zelle or other Payment Apps for business? If yes, 1099-K form required	Yes	No
Did you have any gambling winnings/losses? (If yes W2G's document required)	Yes	No
Did you have any Electronic/Virtual Digital Currency transactions? (Need documentation)	Yes	No
Did you sell any stocks, bonds, mutual funds or other assets? 1099B from Required	Yes	No
Did you make any contributions (outside of payroll) to any IRA in 2024? (Documents required)	Yes	No
Educators - Do you qualify for educator expense? (300 Fed– 500 Iowa) Amount claiming _____	Yes	No
Did you make any cash donations? Amount _____	Yes	No
Did you make any NON Cash donations? Value _____ (GoodWill, Salvation Army,Referral Center, etc)	Yes	No
Did you take early with drawl or distributions from 401K and or Roll over a 401K — 1099-R Required	Yes	No

Do you have Mortgage Interest? 1098-INT Form Required	Yes	No
Do you have Real estate/Property Tax to deduct? Will need to provide documentation OR dollar amount \$ _____ If you live in ILLINOIS and pay property tax we will need your property ID #	Yes	No
Did you purchase any Residential Energy property? Will need proof of Energy Star Certification & Receipt. (Doors, windows, furnace, water heater, etc...)	Yes	No
Did you pay for daycare/child care expense? (Will need Name, SS/EIN, Address of provider & Amount) Need amount paid for each child Attach documents with tax papers	Yes	No
Were any of your dependents, you or your spouse in college in 2024?	Yes	No
Did you pay college tuition/expenses for yourself or dependent in 2024? 1098-T Required & Receipts	Yes	No
Have you taken American Opportunity or Lifetime Learning Education Credit on previous tax returns? (Need years taken-per student claiming College Deduction in 2024	Yes	No
Did you contribute/withdraw money from an educational IRA or 529 plan? Will need contribution letter/ 1098-Q Form Required	Yes	No
Did you pay interest on college loans? 1098-E form Required to report interest deduction	Yes	No
Did you have any debt cancelled/forgiven (credit card, etc.) or a mortgage principle reduction? 1099-C Form Required	Yes	No
Did you pay Registration fees/tuition for your dependents, grades K-12? Need amount paid for each student Attach documentation with tax papers	Yes	No
Did you contribute money to HSA account (Health Savings Account)? 5498-SA and/or 1099-SA Forms Required	Yes	No
Did you operate any Rental Property during tax year?	Yes	No
Did you sell your primary home in 2024? How long did you live there? _____ Need a copy of the closing statement for sale of home and for NEW home you purchased.	Yes	No
Did you sell a second home or vacation home in 2024?	Yes	No
Have you moved to a different school district in 2024? - Need new school district(Iowa residents only)	Yes	No
Have you moved to a different state during 2024? –Need specific dates of residency	Yes	No
Are you a member/beneficiary of an S-Corp, Partnership, Estate, Trust, Etc? Include all K-1	Yes	No
Did you make any Estimated Quarterly payments for this tax year to Federal and/or State? Dates _____ Amounts paid _____ Dates _____ Amounts paid _____	Yes	No

Do you require a Federal Identity PIN # to file your taxes? (A new <i>Pin Letter</i> required each year)	Yes	No
Are you a Volunteer Fire Fighter/EMS? (Letter Required)	Yes	No
We will need Documentation if claiming dependents other than your own children.		
We will need Legal Documents if you are acting as Power of Attorney for someone.		
Do you want a Paper Copy, Emailed Copy or both of your Tax Return?	Paper	Email
Signature _____		
Date _____		