

2024 Tax Client Information and Questionnaire

Filing status for 2024

- ☐ Single - *can someone claim you on another tax return?* (YES or NO)
☐ Married filing jointly
☐ Married filing separately
☐ Head of Household- unmarried with a qualifying dependent and paid more than 50% of household expenses
☐ Qualifying surviving spouse

Tax Prep Information

	Taxpayer #1	Taxpayer #2 (spouse)
Full Name		
Soc Sec #		
Date of Birth		
Occupation		
Email		
Phone #		
Driver's License #		
State of Issuance		
Issue Date		
Exp Date		
Current Home Address		
Did you move in 2024? Previous Address		

Do you have dependents to report?

[illegible]



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Please answer YES or NO

Are you a new client of Grube CPA? If yes, please provide previous year tax return.	
Did you purchase health care from a government Marketplace? If yes, provide form 1095-A	
Did you contribute to a health savings account? If yes, provide form 1099-SA	
Did you at any time during 2024, receive, sell, exchange, or dispose of any virtual currency?	
Is anyone in your household a full-time college student? If yes, provide form 1098-T	
Did you pay student loan interest? If yes, please provide form 1098-E	
Did you pay child/dependent care in 2024? If yes, please provide person SS# or company tax id#, address, and amount spent.	
Do you have small business or rental income to report? If yes, please provide a profit/loss statement with total income and expenses	
Have you been issued an identity PIN by the IRS? If yes, please provide 6-digit PIN.	
Did you contribute to an IRA? If yes, provide \$amount and traditional, Roth IRA, or ABLE	
Did you contribute to a 529 savings plan? If yes, please provide statement	
Did you pay IN property taxes? If yes, please provide amount or statement	
Did you pay Federal or State estimated tax in 2024? If yes, please provide dates paid and amount	
Are you interested in a refund transfer to deduct fees from your refund? *A <i>Refund Transfer is a fee-based product offered by Republic Bank & Trust Company, Member FDIC. A Refund Transfer Fee and all tax prep fees from Grube CPA will be deducted from your tax refund.</i>	

Bank Account for Refunds

_____ I am a returning client. Please use the bank account on file for direct deposit.

_____ I would like a check mailed to me from the IRS.

_____ I would like direct deposit. Please use the bank account below:

Name of Bank	
Checking or Savings?	
Routing Number	
Account Number	

CLIENT SIGNATURE X _____ Date _____