

City Center Tax Group

2024 Tax Questionnaire

Name: _____

Personal Information

Yes	No	?
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Did your marital status change during the year?

If yes, explain: _____

Did you live separately from your spouse during the last six months of the year?

Do you have a separate decree, instrument, or agreement and are not living in the same household by the end of the year?

Did your address change from last year?

Can you be claimed as a dependent by another taxpayer?

Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account number change for existing bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year?

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Did you or your dependents receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, attach the IRS notice for filing returns in 2025.

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Dependent Information

Were there any changes in dependents from the prior year?

If yes, explain: _____

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Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,600?

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Did you provide over half the support for any other person(s) other than your dependent children during the year?

Did you pay for child care while you worked, looked for work, or while a full-time student?

Is there any other person(s) who lived with you more than half the year but not claimed by you last year?

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If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?

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Purchases, Sales and Debt Information

Did you start a new business or purchase rental property during the year?

Did you have ownership interest in any type of business?

Did you sell, exchange, or purchase any real estate during the year?

Did you foreclose or abandon a principal residence or real property during the year?

Did you take out a home equity loan this year?

Did you refinance a principal residence or second home this year?

Did you sell an existing business, rental, or other property this year?

Did you have any debts canceled or forgiven this year, such as a home mortgage, credit cards or student loan(s)?

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Did you purchase a new or previously owned clean vehicle this year that is eligible for the new clean vehicle credit? If yes, attach the vehicle statement from the dealer even if you received the credit when purchased at the dealer.

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Income Information

Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer?

Did you receive any unemployment benefits during the year?

Did you receive any disability income during the year?

Have you received any awards, prizes, hobby income, gambling or lottery winnings?

Did you receive a Form 1099-K, 1099-MISC, 1099-NEC, or other income statement?

Did you have any sales or other exchanges of digital assets (including from an airdrop or a hard fork, or used digital assets to pay for goods or services)?

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Retirement Information

Yes	No	?
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Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?

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Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?

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Did you make any qualified charitable distributions (QCD) during the year?

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Education Information

Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year?

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Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent?

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Did you make any withdrawals from an education savings or 529 Plan account?

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Did you make any contributions to an education savings or 529 Plan account?

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Did you pay any student loan interest this year?

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Health Care Information

Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act?

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Did you make any contributions to a Health savings account (HSA) or Archer MSA?

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Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year?

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Did you pay long-term care premiums for yourself or your family?

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Itemized Deduction Information

Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?

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Did you make any cash or other monetary charitable contributions?

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Did you make any noncash charitable contributions (clothes, furniture, etc.)?

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If yes to either of the above charitable contribution questions, please provide evidence such as a receipt from the donee organization, canceled check, or record of payment, to substantiate all contributions made.

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Did you donate a vehicle or boat during the year?

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Did you pay real estate taxes for your primary home and/or second home?

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Did you pay any mortgage interest on an existing home loan?

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Did you make any major purchases during the year (cars, boats, etc.)?

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Miscellaneous Information

Did you make gifts of more than \$18,000 to any individual?

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Did you utilize an area of your home for business purposes?

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Did you pay any individual as a household employee during the year?

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Did you make energy efficient improvements to your main home this year?

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Did you receive a distribution from, or were you a grantor or transferor for a foreign trust?

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Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country?

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Do you have any foreign financial accounts?

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Are you an owner or do you control 25% of a company's ownership interest for a company registered with a secretary of state or similar office before January 1, 2025?

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If yes, did you file its initial Beneficial Ownership Information Report (BOIR)?

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Did you receive correspondence from the State or the IRS?

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If yes, explain: _____

These answers represent our tax situation to the best of our knowledge:

Taxpayer Date

Spouse Date