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CERTIFIED PUBLIC ACCOUNTANT

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CLIENT CHECK IN WORKSHEET - Tax Year 2024

	Taxpayer	**Spouse**
Name:	______________________	______________________

______ **Check in date:** Office Use Only

Address: No Change / Same as prior year ( )

New: ____

____

Phone:	______________________	______________________
Email:	______________________	______________________
Occupation:	______________________	______________________

If a refund is due, do you want it direct deposited? Yes ( ) No ( )

Is your bank account the same as last year? Yes ( ) No ( )

Financial Institution Name: __________
Routing #: __________
Account #: __________
Checking ( ) Savings ( )

If a balance due, do you want the payments Yes ( ) No ( )
drafted from your account ? (Amounts will be set to come out April 15th)

Dependency Changes: No Change - Same as prior year ( )

New dependent ( )

Name: ______________________

DOB: __________

SSN: ________________

Relationship: __________

Missing Items, Notes, or Questions:

____

____

____

____

Name ______________________________ Tax Year 2024 | Yes | No

1) Would you like to contribute to an IRA for the 2024 year? We can calculate the maximum amount you are able to contribute once we work up the tax return. Please let us know if you will be contributing to a Traditional IRA or a Roth IRA by April 15th. ________ ________

2) Do you expect your 2025 taxable income and withholdings to be different from 2024? ________ ________
(This is mainly for self-employed individual & people that pay estimated tax payments/vouchers)

3) Did you make any residential energy-efficient improvements or purchases?
Examples include certain heat pumps, insulation, doors, windows, solar, wind, geothermal or fuel cell energy sources. If yes provide receipts/documentation (cost, make, model) ________ ________

4) Did you purchase an electric or plug-in hybrid vehicle eligible for Federal Tax Credits? ________ ________
This mainly is applicable for new vehicles (stipulations apply to used vehicles)
(For more info visit: https://fueleconomy.gov/feg/taxevb.shtml)

5) Did you have any transactions pertaining to a health savings account (HSA) or medical savings account (MSA)? If so, include all 1099-SA and/or 5498-SA forms. ________ ________
If you had any distributions, were they used for qualifying medical expenses? ________ ________

6) Are you enrolled in Marketplace Health Insurance? This would be through HealthCare.gov
If so, please include the 1095-A in order to reconcile your advance premium tax credits. ________ ________

7) Did you contribute to a College Savings/529 Plan? ________ ________
(Please enclosed amount of contributions and any applicable paperwork/statements)

8) Do you or any of your dependents pay tuition to a secondary educational institution? If so, include Form 1098-T. Also include the cost of books/supplies required for the related tuition. ________ ________

9) Did you pay any student loan interest? If so, include form 1098-E. ________ ________

10) Are you or your spouse an educator that spent $300 or more of personal money on materials or supplies for your classroom? ________ ________

11) Did you have any interest in or a signature authority over a bank account, securities account, or other financial account in a foreign country? ________ ________

12) At any time during the year, did you or your spouse receive, sell, send, exchange, or otherwise acquire any financial interest in any cypto or virtual currency? ________ ________

Tax Form Reference Guide Please send us all tax forms you receive. We will scan and return all your documents to you.

Income/Deduction	Tax Form
Wages	W-2
Interest, Dividends, Sale of Stocks, Securities, Capital Assets	1099-INT / DIV / B
Miscellaneous Income	1099-MISC or 1099-NEC
Retirement/IRA/Pension Distributions	1099-R
Social Security Income	SSA-1099
Unemployment Compensation	1099-G
Pass-thru Income (LLC's, S Corps, Partnerships, Trusts, Estates)	Schedule K-1
Mortgage Interest	1098
Health Savings Account	1099-SA or 5498-SA
Marketplace Health Insurance Coverage	1095-A
Student Loan Interest	1098-E
Tuition	1098-T