

2024 NEW CLIENT TAX RETURN DROP OFF INFORMATION SHEET

We are able to gather helpful information from your previous year's tax return. Pls provide us with a copy if possible. If you are providing a copy you may indicate to use the prior year information on this sheet.

New IRS regs require us to report information from your state license or ID. Pls provide us with a copy along with your tax documents if possible. If not, we will ask you for a copy when you pick up your return. If filing a joint return, pls provide copies for both filers.

Taxpayer name (T) _____ SSN _____ date of birth: _____

Address: _____ Email: _____ phone: _____

Your Occupation _____

Spouse Name (S) _____ SSN _____ date of birth: _____

Spouse Occupation _____ Email: _____ phone: _____

Pls circle or highlight; who is the best person (taxpayer / spouse) and the best way to contact you (via phone or email)

Anything new this year? Did you move? Buy a home? or begin a new job?

What is your filing status: _____

Single-not legally married on 12/31 **MFJ**-legally married on 12/31 filing jointly

MFS-spouses married on 12/31 but filing a separate tax return

Head of household-not married on 12/31 (or married but did not live together for the last 6 months of the year) and has a qualifying dependent or relative that lived with you for which you paid at least half of the cost of keeping up as your principal residence.

Qualifying Surviving Spouse-taxpayers spouse died during tax year and did not remarry before 12/31/XX.

Qualifying Widow(er) -taxpayers spouse died during the tax year or previous year, did not remarry by 12/31/XX and has a qualifying dependent. Please provide year of death _____

Dependents- *Children living with you age 17 or younger or a full-time student for at least 5 months during the year between ages of 18 and 24.*

Dependents for tax return purposes-Children not living with you but who can be claimed due to an agreement; we will need custodial parents' signature on IRS form 8332 or other dependent members of household which may qualify.

Please include or have receptionist take a photocopy of the dependents Social Security Card

Name _____ D.O.B _____ / _____ / _____ Relationship _____

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INCOME: *please ✓ all that apply and include any supporting documentation. * may need additional info*

____ W-2 ____ 1099 Bank Interest/Dividend Income ____ * Business Income ____ *Capital gain/Loss
____ Social Security/Disability ____ *Rental Income ____ Unemployment/FMLA
____ gambling income (W2-G) ____ Distributions from Retirement Plans (1099R)
____ cancelled debt (ex: credit cards 1099C)

Other income, please explain _____

Did you or your spouse pay or receive taxable Alimony: yes or no ____ If yes, date of divorce ____/____/____

Alimony paid \$ _____ SSN of Recipient ____ - ____ - ____ Alimony received \$ _____

DID YOU AND MEMBERS OF YOUR HOUSEHOLD HAVE HEALTH INSURANCE THIS YEAR?

yes or no ____ *If yes, pls attach form 1099HC from your provider or letter from MassHealth*

Did you purchase health insurance through the Mass Health Connector? yes or no ____

If yes, pls attach form 1095A

Did you or your spouse contribute to an IRA or a SEP outside of employment? yes or no ____

If yes, ROTH or Traditional? ____ Taxpayer \$ _____ Spouse \$ _____

If no, are you interested in contributing? yes or no ____

Did you or your spouse make any contributions to an HSA (health savings account)

outside of your employment? yes or no ____ Taxpayer \$ _____ Spouse \$ _____

If no, are you interested in contributing? yes or no ____

Did you pay any Student Loan Interest? yes or no ____ *If yes, pls provide 1098-E*

Did you, your spouse or any dependent children attend a college or university? yes or no ____

If YES, Student Name ____ Institution ____ Year of Education ____

If you are applying for any educational tax credits, we will need the tax document from the institution as well as a transcript of payments made during the tax year if not included on tax form 1098T.

Energy and Vehicle tax credits; Did you purchase any of the following; yes or no ____

solar panels, fuel cell, wind or geothermal properties, exterior doors, or windows (including skylights), electric or natural gas heat pump or water heaters, central a/c, gas, or oil furnace (including mini-splits) or hot water boiler, biomass stove (pellet stove) -*if yes, we will need a copy of your invoice including installation.*

Electric vehicles; we will need a copy of the certification from your dealer.

Did you make any contributions to a 529 Plan? yes or no ____ \$ _____

Did you pay rent in 2024? yes or no ____ Dates of Rental ____/____/____ to ____/____/____ total rent paid \$ _____

Did you make any charitable contributions in 2024? yes or no ____ Cash donations \$ _____

If yes, you must have proof should a tax agency ask for it in an audit. A good policy is to put copies in with your taxes. If you made any non-cash donations, pls provide us with receipts.

Did you pay any Estimated Tax Payments for the current year? yes or no _____

If yes, pls provide amts and dates

Federal 1. \$ _____ 2. \$ _____ 3. \$ _____ 4. \$ _____

State 1. \$ _____ 2. \$ _____ 3. \$ _____ 4. \$ _____

Do you have a financial interest in or signature authority over at least one financial account located outside of the United States; and the aggregate value of all foreign financial accounts exceeded \$10,000 at any time during the calendar year to be reported? yes or no _____

Do you have any assets (including but not limited to real estate) of value of \$50K or more located **outside of the United States?** yes or no _____

Bitcoin and virtual currency; At any time during the year did you receive, sell, send exchange, or acquire any financial interest in any virtual currency? yes or no _____

If receiving a refund, would you like Direct Deposit? yes or no _____

Bank Name _____ Rtg# _____ Account # _____ Checking or Savings

If owing a balance due, would you like Direct Debit? yes or no _____

Bank Name _____ Rtg# _____ Account # _____ Checking or Savings

If providing banking information, please ensure the information is correct before signing your tax return.

If you have a request for a specific tax preparer, please include here. If this preparer is taking new clients we will see that the paperwork gets to this individual.

We offer a 10% Thank you discount for referrals. If you were referred by anyone, please share that name with us!

By signing below, you are confirming that the information contained in this tax organizer was answered to the best of your ability, was truthful and that you have documentation to substantiate any items for which we are not required to collect. You also agree to provide any additional information necessary to the tax preparer should any be required. If you are not able to provide such information, we reserve the right not to include it in the preparation of your tax return. Your preparer will discuss any required documentation with you.

Print Name

Signature

date