



Accurate Tax & Accounting, Ltd.

2024 Tax Questionnaire (the "Purple Sheet")

NAME _____

EMAIL _____

DURING 2024, DID EITHER YOU AND/OR YOUR SPOUSE.....

Become legally blind, adopt, marry, divorce?	[] YES [] NO
Were you claimed or will you be claimed as a dependent on anyone else's return for 2024?	[] YES [] NO
Live with anyone other than your spouse or dependent child/children or support anyone else?	[] YES [] NO
Have any dependents that had "Gross Income" of over \$1,300 (\$400 if self employed)?	[] YES [] NO
Make or receive any gifts over \$18,000 to or from any one individual?	[] YES [] NO
Hold any U.S. Savings Bonds that were issued in 1994 or earlier? If YES, you must report the interest.	[] YES [] NO
Wish \$3 to go to the Presidential Election Campaign Fund?	[] YES [] NO
Your spouse (if applicable) wish \$3 to go to the Presidential Campaign Fund?	[] YES [] NO
At anytime, did you (a) receive (as a reward, award, or payment for property or services), OR (b) sell, exchange, gift, or otherwise dispose of a digital asset or have a financial interest in any cryptocurrency? Important: if NO , you are certifying that you had no virtual currency transactions.	[] YES [] NO
Have any assets, accounts or interest in or a signature authority over a financial account in a foreign country including a bank, trust, online gambling, virtual currency or other financial account that had a value of \$10,000 or more at ANY time in 2024.	[] YES [] NO
Start a business or purchase rental property? If YES, fill out wks. / provide tax bill & closing papers.	[] YES [] NO
Buy, sell or refinance any real estate ? If YES, please bring your closing documents.	[] YES [] NO
Involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled? If YES, we will need complete details and tax forms you received.	[] YES [] NO
Receive any disability income, OTHER THAN Social Security, during 2024?	[] YES [] NO
Receive any Social Security benefits during the year? If YES, be sure to provide the 1099 from SSA.	[] YES [] NO
Receive any "TIP" income NOT reported to your employer? If YES, amount \$ _____.	[] YES [] NO
Have income or loss from an estate (inheritance) or trust? If YES, we may need Form K-1.	[] YES [] NO
Have income or loss from Partnerships or S Corporations? If YES, we will need Form K-1	[] YES [] NO
Receive any gambling income from ANY state? Provide details. We may need to file for that state.	[] YES [] NO
Contribute to a ROTH or Traditional IRA or SEP — over and above any employer plans?	[] YES [] NO
Take a distribution from your ROTH IRA AND you were under 59 1/2 or had a Roth IRA for less than 5 years at the time of the distribution? If YES, please provide details of your Roth contribution basis.	[] YES [] NO
Convert money from a TRADITIONAL IRA to a ROTH IRA ? If YES, please include details.	[] YES [] NO
Did you process a "Qualified Charitable Distribution" (QCD) from your Traditional IRA account? If YES, please bring your transaction papers from your IRA to the charitable organization.	[] YES [] NO
Receive income or incur expenses associated with Uber, Lyft, Grubhub, DoorDash, InstaCart, Kickstarter, AirBNB, VRBO? If YES, please provide 1099's and/or other documentation and expenses.	[] YES [] NO
Pay wages to any household employees (babysitter, nanny, housekeeper)?	[] YES [] NO
Claimed the "First Time Homebuyer" Credit in 2008, and need to make your LAST payment in 2024?	[] YES [] NO

2024 Tax Questionnaire (cont'd)

Purchase any energy star qualified Clean Energy Improvements (i.e.: solar) or residential improvements (i.e.: windows, doors, insulation, furnace, energy audit, etc.)? Please bring details and receipts.	[] YES [] NO
Purchase a qualified electric vehicle (EV)? Please provide INVOICE, VIN, and dealer's certification.	[] YES [] NO
Pay tuition for any classes beyond high school for you or any family member who appears on your tax return? If YES, please provide Form 1098-T as well as the billing account activity statement for 2024 that shows payments by you, loans, grants, and scholarships. You may need to get this info online.	[] YES [] NO
You make any contributions to a qualified Health Savings Account (HSA)? Please bring Form 1099-SA you received. <i>This is not a flexible savings account (FSA) through your employer.</i>	[] YES [] NO
Take any distributions (swipe your card) from your HSA? We will need Form 5498-SA. If YES, check here if you CERTIFY all distributions were used for qualified medical expenses.	[] YES [] NO <input type="checkbox"/>
Have your employer deduct any child care expenses from your wages on a PRE TAX basis? Please provide day care info.	[] YES [] NO
ANY member of your HOUSEHOLD have health insurance coverage via "The Marketplace" for any months in 2024 (even one)? If YES, we will need copies of ALL Forms 1095-A.	[] YES [] NO
Receive an "IP PIN" from the IRS and/or Wisconsin Dept of Revenue? If YES, please provide your most recent PIN letter. Would you like to know the benefits of having one explained?	[] YES [] NO [] YES [] NO
For no charge we can make an extra copy of your tax return. After your tax return is processed, we do charge a fee. Do you need an extra copy of your tax return made?	[] YES [] NO
ITEMIZERS ONLY	
Purchase a vehicle, motorcycle, boat, RV, during 2024? If YES, we would need the sales tax paid.	[] YES [] NO
Contribute property such as used items (clothing, furniture, vehicle etc.) having an aggregate value of \$500 or more? If YES, please provide required documentation. (1098-C if a vehicle/boat).	[] YES [] NO
★ Pay premiums for a Long Term Care insurance policy? If YES, include what was paid for each person.	[] YES [] NO
★ Pay the cost of ANY medical, dental, drug, vision or other health care PREMIUMS with "After Tax" dollars? This INCLUDES Medicare B & D, supplemental, OR any premiums deducted from your pension or paycheck? Do not include any pre tax or reimbursed premiums.	[] YES [] NO
WISCONSIN RESIDENTS ONLY	
<i>The two questions above with ★ is deductible for Wisconsin residents even if you don't itemize for federal. IF EITHER of the two questions above apply to you— please have ALL your premium information.</i>	
Make any purchases from out-of-state that did NOT collect sales tax? If YES, please provide the amount you paid. If NO, you are certifying you do not owe any sales or use tax.	[] YES [] NO
Pay any private school tuition for your child in grades K-12? If YES, provide school tuition receipt.	[] YES [] NO
Pay any mortgage interest secured by a 2nd home located OUTSIDE of Wisconsin?	[] YES [] NO
Contribute to EdVest and/or Tomorrows Scholar fund (529 plan)? If YES, provide year end statements.	[] YES [] NO
ILLINOIS RESIDENTS ONLY	
Keep track of sales and use tax owed on purchases from out-of-state? If YES, please provide the amount of purchases. \$ _____ If NO, we will use the table provided by IDOR to estimate the amount.	[] YES [] NO
Pay more than \$250 for your child's academic education in grades K-12? If YES, please provide details.	[] YES [] NO
Contribute to a Bright Start/Bright Directions (529 plan)? If YES provide year end statements.	[] YES [] NO

THANK YOU! BRING WITH YOU FOR YOUR TAX APPT. OR WHEN DROPPING OFF. You just saved \$10!

Accurate Tax and Accounting Ltd. 608-362-1224