

Date dropped off _____

Copies of Drivers Licenses attached Y N

Receive return via portal (E-Delivery) Y N

Real Estate Taxes Paid in 2024 on personal residence \$ _____

YOUR NAME NEEDS TO MATCH WHAT IS ON YOUR SECURITY CARD

TAXPAYER

SPOUSE

Name _____

Name _____

SS# _____ DOB _____

SS# _____ DOB _____

Occupation _____

Occupation _____

Phone # _____

Phone # _____

Email: _____

Email: _____

Preferred Contact Method? Circle One: Text

Email Phone-Call

Present Address _____

What School District Did You Live In? 1st _____ Months In 2024? Start _____ End _____
2nd _____ Months In 2024? Start _____ End _____

Did You Live In The City Limits? 1st _____ Months In 2024? Start _____ End _____
2nd _____ Months In 2024? Start _____ End _____

Filing Status? Circle One Single Married filing Joint Married filing Separate Head of Household

Can anyone claim you or your spouse as a Dependent? YES _____ NO _____

Dependents that you are claiming for 2024. Do not list Yourself or Spouse	Birthdate	Social Security #	# months they lived with you	Relationship	disabled? y / n	high school student? y / n	**** college student? y / n
_____	_____	_____	_____	_____	y / n	y / n	y / n
_____	_____	_____	_____	_____	y / n	y / n	y / n
_____	_____	_____	_____	_____	y / n	y / n	y / n
_____	_____	_____	_____	_____	y / n	y / n	y / n
_____	_____	_____	_____	_____	y / n	y / n	y / n

***** If a college student in 2024, please include all Form 1098-T's (usually issued in your child's name & can be obtained thru Students College Portal).

Will any of the dependents above file their own tax return? Y or N List names _____

Did you incur any qualified child care expenses in 2024 YES _____ NO _____ Amount \$ _____ Attach care provider statement !!!!!

Did you or do you plan on contributing to an IRA, SEP, KEOGH OR SIMPLE PLAN for tax year 2024? Y or N

In 2024, did you receive, sell, send, exchange or otherwise acquire any financial interest in a Virtual (Crypto) Currency? Y or N

In 2024, did you have a financial interest in or signature authority over a financial account in a Foreign Country? Y or N

If you have Health Insurance coverage in 2024 thru the Health Care Exchange, You must provide Form 1095A:

If you pay quarterly estimated taxes, did you pay all of the estimates that we sent you? Y or N	LIST AMTS	QTR	Federal	State	Local
		1st	2nd	3rd	4th
		_____	_____	_____	_____
		_____	_____	_____	_____
		_____	_____	_____	_____
		_____	_____	_____	_____

Please provide a Voided Check or Verification of your bank account if you would like your Refund Direct Deposited.

Name of Your Bank _____ Account # _____ Checking Savings

Routing Number _____

Client Signature: _____ Date _____

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Dear Client

As the year winds down, the tax reporting forms begin to arrive, and we want to remind you which ones we need you to accumulate and send to us with your tax information. First, there is a new form, the 1099-K that many of you will receive this year for things like eBay or Facebook Marketplace sales, and sometimes for simple cash transfers using a cash between friends app such as Zelle, CashApp or Venmo. If you receive a 1099-K this year please make sure to provide it to us, and be prepared for a phone call and some questions from us so that we can report it properly to minimize income tax or determine that tax does not apply.

We still need the annual information forms that are sent to you for tax purposes. As a reminder, here is a simple checklist:

- | | | |
|--|---|--------------------------------|
| _____ W-2 for Wages | _____ W-2G for gambling | _____ 1099-INT for interest |
| _____ 1099-DIV for dividends | _____ 1099-B Brokerage | _____ SSA-1099 Social Security |
| _____ 1099-NEC for income | _____ 1099-MISC for income | _____ 1099-K for income |
| _____ 1099-R for retirement | _____ 1098-T for tuition | _____ 1099-SA for HSA's |
| | _____ 1099-G for refunds & | |
| _____ 1098-INT for motgages | _____ Unemployment | |
| _____ 5498 for IRA Values | _____ IRA and Roth IRA Contributions for 2024 | |
| _____ K-1s from Investments in S-Corps and Partnerships | | |
| _____ Child Care Costs, with the name, address, amount and ID # of the recipient | | |
| _____ Charitable Donations - total amounts and recipients | | |
| _____ Property tax paid on your home, property or cars | | |
| _____ Estimated tax payments and dates | | |
| _____ Any letters received from the IRS or state/municipal tax authorities | | |
| _____ Our Engagement Letter | | |

If you have a small business or rental property, we can provide you with a separate checklist for those activities if needed.

Please keep in mind the requirements of issuing 1099's.

It is imperative that all farmers and business owner's & rental owners issue form 1099-NEC (New form started with tax year 2020) for any payments you make for services that are \$600.00 or greater. Rental payments that are \$600.00 or greater continue to use the 1099-MISC. These forms are due January 31, 2024, and the IRS has increased the fines for non-compliance and are currently increasing enforcement through audit efforts. We are happy to assist you with the preparation of the 1099's.

Again, IRS scrutiny of foreign accounts means that you need to be absolutely clear about any non-US accounts or income so that we report it correctly.

Cryptocurrency activities continue to cause major tax problems for people that believe it is not reportable. Bluntly, cryptocurrency is taxable, is reportable, and carries incredible penalties for not reporting, so make sure to discuss it with us if you dipped your toes in that water.

Office Operations

1. Our office will be preparing taxes three ways this tax season. 1. Drop off - where you simply drop off your questionnaire and tax info, we prepare the return, and we notify you within a week for pickup 2. Meet and greet - you schedule an appointment with our office, we meet with you to discuss tax issues, questions, etc., we prepare the return after the meeting, and we notify you within a week for pickup 3. Full virtual, no contact tax preparation through E-Delivery - allows for you to send tax information through a secure portal, receive your copy of your return in a pdf format, allows you to sign all necessary forms electronically, and make payment for our services. Just call our office and we will send you your link to the portal to get the process started. We will not be performing prepare while wait services this year.
2. We do not automatically file income tax extensions for our clients, you must contact our office via email or fax to request us to prepare an extension. There will be a \$25.00 service charge for tax year 2024 for preparing extensions.
3. Due to the many tax law changes that have occurred over the last 4 years, not all your relevant tax information comes to you with your tax forms. Therefore, we will not complete any returns that do not have a fully completed 2024 Client Questionnaire with their tax information. We apologize for any inconvenience, but this is necessary for us to have this information to accurately prepare your return, even if you have completed one in the past.
4. Additionally, we need copies of current drivers' licenses each year for the taxpayer and spouse at the time of drop off, this is a new requirement as a result of the increasing incidence of identity theft.

New Developments

With the increase of potential identity theft, in certain cases the IRS is issuing Identity Protection PIN (IP PIN) to taxpayers, or if you have been a victim of potential identity theft you can request a PIN # be issued. If you receive a letter from the IRS that notifies you of such a PIN, you must provide us this information at tax time, as this number is necessary to file your return.

Credits are still in place for home improvements this year and can provide you with tremendous tax benefits. If you installed a new furnace, A/C, boiler, heat pump, water heater, woodstove, windows, doors, insulation, solar or battery storage please be sure to provide us with a copy of the invoice.

Similarly, if you bought a new electric or hybrid car in 2024 please be sure to provide that invoice copy as well.

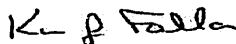
Finally, with the Corporate Transparency Act passed in 2021, if your business is an LLC or corporation, including a single member LLC, you must file with the Financial Crimes Enforcement Network before January 1, 2025, however in late December, a federal court has put a stay (hold) put on this act, stay tuned for future filing requirements. If you have not already filed, we suggest you contact us to be put on our list, in case the stay is lifted.

Every year we are reminded how much we value your business, and we want to once again say thank you. Please call us with any questions.

Sincerely,



Mark A. Frazier CPA



Kim J. Fallon CPA



Jamie A. Miller CPA