

**Tax Year 2024**

Name(s): \_\_\_\_\_

If legally married the last day of 2024, do you both agree to file a joint return? \_\_\_\_\_

Which dependent(s) will you be claiming on this year's tax return (please write legal name):

1. \_\_\_\_\_ 4. \_\_\_\_\_

2. \_\_\_\_\_ 5. \_\_\_\_\_

3. \_\_\_\_\_ 6. \_\_\_\_\_

For the dependents listed above:

Were you (or your spouse if filing jointly), legally eligible to claim each dependent? \_\_\_\_\_

Can anyone else legally claim any of the dependents listed above? \_\_\_\_\_

Did you provide at least 50% financial support for the dependents listed above? \_\_\_\_\_

Did each dependent live with you at least 50% of last year? \_\_\_\_\_

Has any tax credit related to dependents ever been reduced or disallowed in a prior year after an attempt was made to take the credit? \_\_\_\_\_

What is or will be your current address as of the filing of this return: \_\_\_\_\_

What was your occupation title last year: \_\_\_\_\_ Spouse: \_\_\_\_\_

Did anyone on the return have any digital asset (ex. Bitcoin cryptocurrency) transactions in 2024? \_\_\_\_\_

Did anyone on the return have any online purchases in which sales tax was not paid? \_\_\_\_\_

Did anyone on the return have any financial interest or signature authority over a financial account located in a foreign country? \_\_\_\_\_

Did anyone on your return gift more than \$18,000 of property or money to another in 2024? \_\_\_\_\_

Did you or your spouse purchase an electric vehicle last year? (If so, purchase papers are required.) \_\_\_\_\_

Did you or your spouse contribute to a retirement plan outside of work (IRA)? \_\_\_\_\_

If so, provide details: \_\_\_\_\_

ONLY for born 12/31/1951 or before OR individuals with inherited retirement accounts (write N/A if not applicable):

Were all Required Minimum Distributions (RMD) taken in 2024? \_\_\_\_\_

Taxpayer's Signature: \_\_\_\_\_ Spouse's Signature: \_\_\_\_\_