

Jupiter CPA, Inc. 2024 Questionnaire*

Please fill in the appropriate Circle and **INCLUDE ALL THE NECESSARY DOCUMENTS**

Personal Information:

Name: _____

- YES NO Did your marital status, home address, contact, or banking information change within the past year?
- YES NO Could you or your dependent be claimed as a dependent on someone else's return for 2024? If yes, list: _____
- YES NO Did you receive correspondence from the state or IRS? Please provide a copy.
- YES NO If there is an overpayment of taxes how would you like to apply them: Estimated Payments____ Refund by check____ Direct Deposit____
- YES NO Did you make any estimated payments during the year? If yes, Amounts and dates of each: _____

Dependent Information:

- YES NO Were there any changes in dependents, and did they earn money and file their own tax return? If yes, explain
- YES NO Did you provide over half the support for any other persons other than your dependent children during the year? If so, who?
- YES NO Did you pay for childcare while you worked, looked for work, or while a full-time student? If yes, provide receipts and EIN
- YES NO Are you divorced or separated with child(ren) (within the past year); do you have a finalized divorce decree?

Purchases, Sales, and Debt Information:

- YES NO Did you start, sell, or purchase a business or rental property during 2024? If so, provide documents.
- YES NO Did you acquire or lose any stock this year? Provide realized gains/losses.
- YES NO Did you purchase, sell, or refinance a principal residence or second home this year? If so, provide closing documents.
- YES NO Did you have any debts canceled or forgiven this year, such as, home mortgage or **
- YES NO Are you owed money which became uncollectable or incurred a loss because of damage or stolen property?

Income Information:

- YES NO Did you receive unemployment or disability benefits/income this year? Provide disability/income or 1099-G
- YES NO Did you make or receive a gift of more than \$18,000 to or from anyone?
- YES NO Did you receive any awards, prizes, hobby income, gambling, or lottery winnings?
- YES NO Did you pay or receive alimony due to divorce? If so, how much?

Retirement Information:

- YES NO Did you receive any Social Security benefits during the year? Provide SS statement
- YES NO Did you receive any payments (lump sum or regular) from a pension, profit sharing or 401(k) plan? Provide 1099-R
- YES NO Did you make contributions, or roll over to an IRA, Roth, Keogh, Simple, SEP, or other qualified retirement plan? How Much?

Education Information:

- YES NO Did you, your spouse, or dependents attend a post-secondary school during the year? Provide 1098-T
- YES NO Did you pay any student loan interest this year? Provide 1098-E
- YES NO Did you contribute or receive a distribution from an education savings account?

Health Care Information:

- YES NO Did you enroll in Marketplace Coverage through healthcare.gov? Please provide any Form(s) 1095-A
- YES NO Did you make any contributions to a Health savings account (HSA) or Archer MSA?
- YES NO Did you receive any distributions from a HSA, Archer MSA, or Medicaid Advantage MSA this year?

Miscellaneous Information:

- YES NO Did you receive an Identity Protection PIN from the IRS, or have you (or a dependent) been a victim of Identity Theft? **
- YES NO Did you want a copy of your return emailed to you? E-mail: _____
- YES NO Did you use fuel for any off-road business or commercial Fishing?
- YES NO Did you engage in a transaction involving virtual currency in 2024
- YES NO Did you make energy efficient improvements to your home?

Itemization: If you can overcome the standard deduction (Married filing jointly \$29,200, Single filer \$14,600) see the following:

- YES NO Did you pay long-term care premiums for yourself or your family?
- YES NO Did you make any cash or non-cash charitable contributions (clothes, furniture, etc.)? Attach totaled receipts.
- YES NO Did you use your vehicle on the job, other than commuting? Provide mileage.
- YES NO Did you work out of town for part of the year? Provide receipts.
- YES NO Did you utilize an area of your home for your business?
- YES NO Did you make any major purchases during the year (including cars, electric vehicles, boats, etc.)? Provide Bill of Sale.
- YES NO Did you pay state or local real estate property taxes this year? How much? \$_____ When?