

Texas Tax Angels Bookkeeping Services LLC

2024 Individual Tax Questionnaire

Taxpayer Name:
 Full Name

Spouse Name:
 Full Name

Please answer **YES** or **NO** to **ALL** questions, sign, and date.

Personal Information

Are you a returning client or new client?	<input type="checkbox"/> RETURNING	<input type="checkbox"/> NEW
Can you or your spouse be claimed as a dependent by another taxpayer?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Are you claiming any dependents? <i>If yes, continue to the next section "Dependents". If no, SKIP the next section "Dependents" and continue on to section "Income".</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO

Dependents

**** ALL dependents MUST HAVE lived with you or a college student for AT LEAST 6 MONTHS IN 2024. ****
****Proof of Address MUST BE submitted for EACH dependent.****

Did you pay for daycare, after-school care program, or summer care program? <i>If yes, provide a tuition statement from the care facility OR provide the EIN or SSN for the care facility AND the total amount of tuition paid.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Do any of your dependents have unearned income more than \$1,300? <i>If yes, provide Form 1099.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did any of your dependents have earned income over \$4,800? <i>If yes, provide dependent's W-2.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Are any of your dependents required to file a tax return? <i>If yes, does Texas Tax Angels need to prepare their tax return? If yes, please have your dependent call our office for further instructions.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you adopt a child or begin adoption proceedings?	<input type="checkbox"/> YES	<input type="checkbox"/> NO

Income

Did you receive W-2 income in 2024? <i>If yes, upload ALL W-2's upon completion of this questionnaire.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you receive 1099-NEC income in 2024? <i>If yes, upload ALL 1099-NEC's upon completion of this questionnaire.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you have a business that received OVER \$5000 in credit card payments in 2024? <i>If yes, you will you receive Form 1099-K from your credit card processing company and you MUST provide us with Form 1099-K in order to complete your tax return.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO

Texas Tax Angels Bookkeeping Services LLC

2024 Individual Tax Questionnaire

Healthcare

Did you obtain healthcare coverage through the Marketplace (ObamaCare)? <i>If yes, you MUST provide Form 1095-A.</i> <i>(The 1095-A Form was mailed to you in January 2025 OR you can access your forms at www.healthcare.gov)</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If you received advance premium tax credit, are married, and are filing separately from your spouse, are you a victim of domestic abuse or spousal abandonment?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you make any contributions to a health savings account (HSA)? <i>If yes, provide Form 5498-SA.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you receive any distributions from a health savings account (HSA)? <i>If yes, provide Form 1099-SA.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse receive any distributions from long-term care insurance contracts? <i>If yes, provide Form 1099-LTC.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If you or your spouse are self-employed , do you or your spouse have health insurance? <i>If yes, provide total dollar amount of premiums paid in 2024. \$</i> <input style="width: 150px;" type="text"/>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If yes, are you or your spouse eligible to be covered under an employer's health plan at another job? <i>If yes, how many months were you covered?</i> <input style="width: 100px;" type="text"/>	<input type="checkbox"/> YES	<input type="checkbox"/> NO

Deductions and Credits

Did you or your spouse contribute property (other than cash) with a fair market value of more than \$5,000 to a charitable organization? <i>If yes, provide donation date, dollar amount, description of property donated, and name of charitable organization here:</i> <input style="width: 900px; height: 20px;" type="text"/>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse incur any casualty or loss attributable to a federally declared disaster? <i>If yes, provide name AND specific date of federal disaster & description AND value of losses here:</i> <input style="width: 900px; height: 20px;" type="text"/>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse purchase a NEW motor vehicle and/or boat in 2024? <i>If yes, provide sales contract.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse purchase a new alternative technology vehicle, including a qualified plug-in electric drive motor vehicle? <i>If yes, provide sales contract AND any EOV specific manufacturer's information provided by your car dealer.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you install solar panels at your primary residence in 2024? <i>If yes, provide receipt and/or sales contract.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic) or fuel cells in 2024? <i>If yes, provide receipt and/or sales contract.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you install any energy efficiency improvements or energy property in your residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners, or water heaters in 2024? <i>If yes, provide receipt and/or sales contract.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO

Texas Tax Angels Bookkeeping Services LLC

2024 Individual Tax Questionnaire

Education

Were you, your spouse, or dependent(s) enrolled in college or trade school in 2024? <i>If no, SKIP this section and continue on to section "Investments".</i> <i>If yes, answer all education questions below.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you incur any education expenses for college or trade school? <i>If yes, provide Form 1098-T.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did your spouse incur any education expenses for college or trade school? <i>If yes, provide Form 1098-T.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did any of your dependents incur any education expenses for college or trade school? <i>If yes, provide Form 1098-T.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you pay any student loan interest for yourself? <i>If yes, provide Form 1098-E.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you pay any student loan interest for your spouse? <i>If yes, provide Form 1098-E.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you pay any student loan interest for your dependent ? <i>If yes, provide Form 1098-E.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you receive a scholarship(s) in 2024? <i>If yes, provide total scholarship amount awarded. \$</i> <input style="width: 150px;" type="text"/>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did your spouse receive a scholarship(s) in 2024? <i>If yes, provide total scholarship amount awarded. \$</i> <input style="width: 150px;" type="text"/>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did any of your dependents receive a scholarship(s) in 2024? <i>If yes, provide total scholarship amount awarded. \$</i> <input style="width: 150px;" type="text"/>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you have out of pocket expenses for tuition, books and/or school supplies? <i>If yes, provide total amount of out of pocket costs. \$</i> <input style="width: 150px;" type="text"/>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did your spouse have out of pocket expenses for tuition, books and/or school supplies? <i>If yes, provide total amount of out of pocket costs. \$</i> <input style="width: 150px;" type="text"/>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did any of your dependents have out of pocket expenses for tuition, books and/or school supplies? <i>If yes, provide total amount of out of pocket costs. \$</i> <input style="width: 150px;" type="text"/>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Is the college student a candidate for a degree?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse withdraw any amounts from an IRA to pay for higher education expenses incurred by you, your spouse, your children or grandchildren? <i>If yes, were the amounts withdrawn used for higher education expenses?</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
<i>If yes, provide Form 1099-R AND total amount used for higher education expenses. \$</i> <input style="width: 150px;" type="text"/>	<input type="checkbox"/> YES	<input type="checkbox"/> NO

Texas Tax Angels Bookkeeping Services LLC

2024 Individual Tax Questionnaire

Education

Did you or your spouse withdraw any amounts from a Coverdell Education Savings Account ?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If yes, were the amounts withdrawn used for qualified education expenses?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If yes, provide Form 1099-R AND total amount used for education expenses. \$ <input style="width: 100px;" type="text"/>		
Did you or your spouse withdraw any amounts from a Qualified Education Program (Section 529) ?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If yes, were the amounts withdrawn used for qualified education expenses?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If yes, provide Form 1099-R AND total amount used for education expenses. \$ <input style="width: 100px;" type="text"/>		
Have you, your spouse, or dependents claimed the American Opportunity Tax Credit for higher education expenses?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If yes, for whom and how many year(s) was the credit claimed? <input style="width: 400px;" type="text"/>		
If yes, has the student been convicted of a felony for possession or distribution of a controlled substance?	<input type="checkbox"/> YES	<input type="checkbox"/> NO

Investments

Did you or your spouse have ownership in any partnership or S Corporation in 2024?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If yes, provide Form K-1 & business name here: <input style="width: 300px;" type="text"/>		
Did you or your spouse start or purchase a business?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If yes, provide ALL formation documents.		
Did you or your spouse own a rental property?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If yes, provide Form 1099-MISC and ALL expenses.		
Did you or your spouse own a farm/ranch?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If yes, provide ALL farm income and expenses.		
Did you or your spouse sell an existing business, rental property, real estate, or farm?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If yes, provide closing statement (HUD)/contract.		
Did you or your spouse purchase or exchange (1031) any real estate?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If yes, provide HUD statement (closing statement).		
Did you or your spouse inherit any property in 2024?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If yes, provide additional details here: <input style="width: 400px;" type="text"/> <input style="width: 900px; height: 20px;" type="text"/>		
Did you or your spouse have any debts canceled or forgiven?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If yes, provide Form 1099-C .		

Texas Tax Angels Bookkeeping Services LLC

2024 Individual Tax Questionnaire

Digital Assets

Did you or your spouse have ANY digital asset transactions in 2024? <i>If yes, please answer ALL other questions in this section.</i> <i>If no, SKIP this section "Digital Assets" and continue on to section "Foreign Matters".</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse receive digital assets as payment for property or services provided? <i>If yes, provide Form 1099-B.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse receive digital assets as a result of a reward or award? <i>If yes, provide Form 1099-B.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse receive digital assets as a result of a mining, staking, and similar activities? <i>If yes, provide Form 1099-B.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse receive digital assets as a result of a hard fork? <i>If yes, provide Form 1099-B.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse dispose of digital assets in exchange for property or services? <i>If yes, provide Form 1099-B.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse dispose of digital assets in exchange or trade for another digital asset? <i>If yes, provide Form 1099-B.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse sell a digital asset? <i>If yes, provide Form 1099-B.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse transfer digital assets for free as a bona fide gift? <i>If yes, provide Form 1099-B.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse dispose of any other financial interest* in a digital asset? *Financial interest in digital assets means you are the owner of record of a digital asset. That you have a stake in an account that holds one or more digital assets, which includes rights and obligations to acquire a financial interest. You own a wallet that holds digital assets.* <i>If yes, provide Form 1099-B.</i>	<input type="checkbox"/> YES	<input type="checkbox"/> NO

Foreign Matters

Did you or your spouse create or transfer money or property to a foreign trust?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse perform any work outside of the U.S. or pay any foreign taxes?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Were you or your spouse grantor or transferor for a foreign trust, have any interest in or a signature authority over a bank account, securities account or other financial account in a foreign country?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse own any foreign financial assets?	<input type="checkbox"/> YES	<input type="checkbox"/> NO

Texas Tax Angels Bookkeeping Services LLC

2024 Individual Tax Questionnaire

Retirement and Severance

If qualified, do you want or will you make a 2024 contribution to your SEP ? If yes, provide dollar amount. \$ <input style="width: 150px;" type="text"/>	<input type="checkbox"/> YES <input type="checkbox"/> NO
If qualified, do you want or will you make a 2024 contribution to your ROTH IRA by April 15, 2025? If yes, provide dollar amount. \$ <input style="width: 150px;" type="text"/>	<input type="checkbox"/> YES <input type="checkbox"/> NO
Did you or your spouse convert an existing IRA into a Roth IRA? If yes, provide dollar amount. \$ <input style="width: 150px;" type="text"/>	<input type="checkbox"/> YES <input type="checkbox"/> NO
Did you or your spouse transfer or rollover any amount from one retirement plan to another? If yes, provide Form 1099-R .	<input type="checkbox"/> YES <input type="checkbox"/> NO
Did you or your spouse receive any distributions from a retirement plan? If yes, provide Form 1099-R .	<input type="checkbox"/> YES <input type="checkbox"/> NO
Did you or your spouse turn age 73 and have money in an IRA or other retirement account without taking any distribution? If yes, provide further details here: <input style="width: 600px;" type="text"/> <input style="width: 600px;" type="text"/>	<input type="checkbox"/> YES <input type="checkbox"/> NO
Did you or your spouse make a qualified charitable distribution directly from an IRA? If yes, provide Form 1099-R .	<input type="checkbox"/> YES <input type="checkbox"/> NO
Did you or your spouse withdraw any amounts from an IRA to pay for medical expenses, acquire a principal residence, or other exempt distributions? If yes, provide Form 1099-R .	<input type="checkbox"/> YES <input type="checkbox"/> NO
Did you or your spouse inherit a retirement account in 2024? If yes, provide further details here: <input style="width: 600px;" type="text"/> <input style="width: 600px;" type="text"/>	<input type="checkbox"/> YES <input type="checkbox"/> NO

Personal Residence

Did you or your spouse claim a homebuyer credit for a home purchased in 2008? If yes, provide remaining balance of repayment. \$ <input style="width: 150px;" type="text"/>	<input type="checkbox"/> YES <input type="checkbox"/> NO
Did you or your spouse have a mortgage in 2024 for your principal and/or secondary residence? If yes, provide Form 1098-MORT to show mortgage interest paid .	<input type="checkbox"/> YES <input type="checkbox"/> NO
Did you or your spouse pay property tax in 2024 on your principal and/or secondary residence? If yes, provide proof of property tax payment .	<input type="checkbox"/> YES <input type="checkbox"/> NO
If qualified, did you or your spouse use a designated room of your primary residence as a home office? If yes, provide square footage of home office room. <input style="width: 150px;" type="text"/> SQ FT	<input type="checkbox"/> YES <input type="checkbox"/> NO

Texas Tax Angels Bookkeeping Services LLC

2024 Individual Tax Questionnaire

Answer the questions below ONLY IF you SOLD your primary residence.

Did you or your spouse own and occupy the home as your principal residence for at least two years of the five- year period prior to the sale?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Was this property ever used as a rental property?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse ever use any portion of the home for business purposes?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Have you or your spouse sold a previous principal residence within the last two years?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
At the time of sale, were you or your spouse active duty military?	<input type="checkbox"/> YES	<input type="checkbox"/> NO

Miscellaneous

Did you or your spouse make any gifts with a total value in excess of \$18,000 to any individual? If yes, provide further details here: <input style="width: 60%;" type="text"/> <input style="width: 95%;" type="text"/>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Do you or your spouse have any tax filing requirements for another state? If yes, which state? <input style="width: 30%;" type="text"/>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse receive unreported tip income of \$20 or more in any month? If yes, what is your total unreported tip income for 2024? \$ <input style="width: 20%;" type="text"/>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Have you or your spouse received a punitive damage award for damages other than for physical injuries or illness? If yes, provide further details here: <input style="width: 60%;" type="text"/> <input style="width: 95%;" type="text"/>	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Do you or your spouse have any lottery or gambling winnings for 2024? If yes, provide Form W-2G AND \$ of total losses.	<input type="checkbox"/> YES	<input type="checkbox"/> NO
If yes, do you want to file the related state tax returns, if applicable? There is an additional prep fee.	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Did you or your spouse receive Social Security or disability income (EXCLUDING VA Disability)? If yes, provide Form SSA-1099.	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Do you or your spouse currently have an installment plan with the IRS? If yes, provide further details here: <input style="width: 40%;" type="text"/> <input style="width: 95%;" type="text"/>	<input type="checkbox"/> YES	<input type="checkbox"/> NO

Texas Tax Angels Bookkeeping Services LLC 2024 Individual Tax Questionnaire

Miscellaneous

Were you or your spouse notified in 2024 by the IRS or other taxing authority of any changes in prior year returns? YES NO

If yes, provide further details here.

May the IRS discuss your 2024 tax return with your tax preparer? YES NO

Did you or your spouse make any 2024 estimated tax payments to the IRS? YES NO

*If yes, provide **proof of payment** for each estimated tax payment made.*

Do **you** have an IRS Identity PIN? YES NO

If yes, provide IRS PIN letter and/or list PIN # here.

Does **your spouse** have an IRS Identity PIN? YES NO

If yes, provide IRS PIN letter and/or list PIN # here.

If applicable, do you want to use **Direct Deposit** for your 2024 tax refund? YES NO

If yes, provide the following:

Bank Name:

Bank Routing #:

Bank Account #:

Circle type of account: CHECKING SAVINGS

Upon completion of your tax return, how do you prefer to **sign** your tax return? Select one option below:

Electronically via Liscio

In Person at Texas Tax Angels Office

If you chose to **sign electronically**, how would you like to **receive a copy** of your tax return? Select one option below:

Digital copy via Liscio

Paper copy mailed

Both; Digital copy via Liscio & Paper Copy Mailed

Taxpayer Signature:

Date:

Spouse Signature:

Date: