

**2024 Check in Form**

**Your tax return will be uploaded to your portal when completed, unless you request otherwise**

- Portal upload is fine
- Please do not upload to the portal – I will pick it up
- Please do not upload to the portal – I would like it mailed to me

Taxpayer Name\_\_\_\_\_

Taxpayer Email Address\_\_\_\_\_

Occupation\_\_\_\_\_

Spouses Name \_\_\_\_\_

Spouse Email Address\_\_\_\_\_

Occupation\_\_\_\_\_

Taxpayer Phone \_\_\_\_\_

Street Address\_\_\_\_\_

City\_\_\_\_\_ State\_\_\_\_\_ Zip\_\_\_\_\_

**Status at the end of the tax year**

- Single
- Married
- Legally Separated for at least the last 6 months of the year or Divorced
- Head of Household – I am single and have at least one dependent

**Do you have any change in dependents this year?**

- Yes – please explain \_\_\_\_\_
- No

**Did you receive, sell, send or acquire a financial interest in digital asset/virtual currency?**

Yes

No

**Do you have any non-US sources of income?**

Yes – Source/Country\_\_\_\_\_

No

**Any new sources of US income this year? Please check all that apply.**

Wages (W2)

Interest (1099 INT)

Dividends (1099 DIV)

Social Security

Distributions from retirement accounts (1099 R)

Stocks/asset sales (1099B)

Partnerships and S corporations (K1 forms)

Rental income – Get Form “Schedule E” from us and fill out

Canceled debt

Self-employment Business – Get Form “Schedule C” from us and fill out

Gambling (win loss statement)

Farming – Get Form “Schedule F” from us and fill out

Home sale (1099S)

Sale of Land – We will need a copy of the Sales Contract, and the amount you paid for the Land (Basis)

None if the above

Royalty Income (1099 Misc)

Land Damages/Easements (1099 Misc) Need Basis of Land (purchase amount) and Oil Company paperwork

**Any itemized deductions you would like to use and they add up to greater than \$27,700 if you are married or \$13,850 if you are single? Please check all that apply:**

Medical expenses

Medical Insurance Premiums (do not include Medicare is on Social Security Statement)

Long Term Care Premiums

Charitable contributions – Receipts required for contributions over \$500, need separated totals by cash/goods

Property taxes – Separate totals by category: Home, Business, Rental, Oil and Gas

Mortgage interest

**Do you have any of the following other deductions? Please provide the documentation:**

Student loan interest

Educator expenses

Health savings account

Retirement account contributions (not through your job)

Tuition or book expense for College

Energy Efficient Home Improvements

Electric Vehicle

Child Care Tuition

**Direct Deposit**

If you are entitled to a refund, would you like a direct deposit?

Yes – Please attach voided check

No – I would like a check sent to me

**Did you make federal estimated tax payments for last year?**

Yes – Please list dates and amounts

No