



PLEASE ANSWER ALL (even if the answer is NO) & ATTACH all PERTINENT data.

IN 2024, YOU (OR YOUR SPOUSE):

YES NO



- Has your Marital Status Changed? _____
- Did your Address Change since you filed your 2024 Return? _____
- Are you being claimed as a Dependent on another person’s return? _____
- Are there any changes in the Dependent Information from 2023 (school, dependency, etc) _____
- Do your Dependent children have Investment Income? _____
- Were You and/or your Spouse a Citizen all year? (Circle which one(s)) _____
- Were you and/or your Spouse a Resident Alien All Year? (Circle which one(s)) _____
- Do you have dependents who are NEITHER U.S. Citizens nor U.S. Residents? _____
- Did you pay **Education Expenses** for your Dependent Children? _____
- Did you pay over half of the support for a parent who lived with you or lived elsewhere? _____
- Did you maintain a household & pay over 1/2 the support for someone you are not claiming as a Dependent on your Income Tax Return (eg. Due to divorce, etc) _____
- Are either you (or your spouse, if filing with a spouse) an Honorably Discharged VETERAN of the Military or National Guard? If so, attach **DD214** if not already provided. _____
- Have you or your spouse or your dependents been victims of Identity Theft and/or been given an **Identity Theft Protection Six Digit PIN** by the IRS? _____
- Receive any **Income Tax Notices** from the IRS or the State? _____
- Were you ever Denied or Disallowed the Earned Income Tax Credit or Child Tax Credit in a Prior Year, or were your credits reduced in a prior year? _____

FOREIGN INCOME

- At any time during 2024, Did you (alone or with another) Hold **signature authority** or an interest in or have funds in a **foreign bank, securities,** or other **financial accts**? _____
- Have **income producing** assets in a **foreign country,** sell foreign property, or pay foreign taxes? _____
- Receive gifts or bequests from a **foreign entity** or from a **Foreign person**? _____
- Did you receive any Foreign Income of any sort, rental property, business, etc? _____



SALES & USE TAX

- Make an **out-of-State** purchase or online for which you owe **USE TAX,** or **other Sales Taxes**? _____
- Buy a new vehicle, boat or aircraft and pay **State Sales Tax**? (give details) _____

Be sure to provide all pertinent information. Packet A on our website contains important information and explanations for many of the questions. www.nancyfeltz.com

INCOME

YES NO

- Have **Any Other Income** not included in these questions?:
 - a. Solar Power Income from Home Panels? _____
 - b. GIG Economy Income (online, freelance, platform, marketplace, apps, Airbnb, etc)? _____
 - c. Independent Contract work even if not reported on a tax document? _____
 - d. Unreported Tip Income? _____
 - e. Gambling Winnings or Losses, Fantasy Sports, etc., ETC.- online or in person _____
- Have **Any Other** Income that was NOT reported on a Tax Document? _____
- Receive Unemployment Compensation **and/or Disability Payments** _____
- Receive Qualified Sick & Family Leave Wages? _____
- Receive Alimony (provide Date of Divorce Decree and amount)? _____
- Receive **early distribution** from IRA, 401(k), etc. (**give details** of use) eg, for **medical expense**)? _____
- Receive payments from a **Long-Term Care** Insurance Contract? **Attach** _____
- Receive **Employer provided education assistance**? _____
- Did you **Barter** your Services for goods or services from someone else? _____
- Receive Stock from a Stock Bonus Plan with your Employer? _____
- **Sell any assets** other than stocks & bonds? _____
- **Purchase** or **sell** your Principal residence, or re-finance? Attach Closing Documents) _____
- Did you purchase or sell **any other** Residence or Property? (Attach Closing Documents) _____
- Is your home considered a **Historic Home**? _____
- Suffer a **Foreclosure** on a home or have **Mortgage Debt Forgiveness**, have a **Short Sale, etc?** _____
- **CRYPTO CURRENCY/VIRTUAL CURRENCY AND NFT's, etc.** _____
- AT ANY TIME DURING 2024, DID YOU _____
- (a) Sell, Exchange, Gift, or otherwise Dispose of a Digital Asset (or a financial interest in a Digital Asset) _____
- (b) Receive (as a reward, award, or payment for property or services) or as a hobby; or _____
- (c) Receive Digital Assets resulting from a hard fork? _____
- Go through **Bankruptcy** proceedings? _____
- Make a **ROTH conversion** in 2024? _____
- Make a Qualified Distribution to a **Charity** from a **ROTH** or **Traditional IRA**? _____
- Suffer a **casualty loss** of any kind or in a **FEDERAL declared disaster area**? _____
- Receive proceeds from a **lawsuit** or **class action**? _____
- Were you a victim of **investment theft** or a **Ponzi Scheme**? _____
- Have income from **installment sales**? _____
- Make a Loan at an Interest Rate below Market Rate? _____
- Did any security become worthless during 2024 or any debts become uncollectible? _____
- Did you exchange any securities or investments for something other than Cash? _____



- Receive **Hobby** Income? _____
- Engage in any **Farming** activities? _____
- Receive **TIP Income** which is not reported on Form W-2's? _____
- Anticipate a **Major Change** in **Income** or **Deductions** for the coming year? _____

DEDUCTIONS FROM INCOME

- **Pay Expenses for the care of your Child or other qualifying person so you could work?** _____
- **Pay any Student Loan Interest?** _____
- Have **moving expenses (FOR MILITARY PERSONNEL ONLY)?** _____
- Make or plan to make any contributions to a **Self-employed SEP, SIMPLE or Qualified Plan?** _____
- Make or plan to make any contributions to an **IRA, or ROTH IRA, etc** for 2024? _____
- Make or plan to make contributions to a Medical Savings Account for 2024 (**HSA, Archer MSA, etc.**) _____
- Make or plan to make any contributions to a Section 529 or ABLE account? _____
- Have un-reimbursed **Educator Expenses?** (Covid supplies qualify) (**\$300 for 2024**) _____
- Incur unreimbursed expenses as a **Reservist, performing artist or fee-based govt official?** _____
- Pay expenses to **adopt** a child in 2024 or file a Form 8839 Adoption Credit in a prior year? _____
- Pay **household employees** (over age 18), nanny, housekeeper, cook, etc of **\$2,700** or more? _____
- Purchase a Qualified Fuel or an Electric Hybrid Vehicle in 2024? _____
- Perform or purchase any **SOLAR or Energy Efficient Property or HOME IMPROVEMENTS?** _____
- Did you pay for Long Term Care Insurance? _____
- Pay Alimony (Provide Date of Divorce Decree and Amount)? _____

HEALTH COVERAGE

- Did you have **Health Insurance Coverage** at any time in **2024?** Give details and months (B4) _____
- Did you receive **Form 1095-A** for 2024 regarding health coverage? **Provide all copies . . .** _____
- Did you receive any other Forms 1095? Please provide _____



OTHER

- Make gifts of more than **\$18,000** to any individual, a trust or a Qualified Prepaid Tuition Plan? _____
- Need my Services for preparation of **Estate, Gift or Inheritance Tax Returns?** _____
- **NEW CLIENTS** – Have you sold business property in the last 5 years? Paid AMT in the past? _____

INDICATE IF I CAN DISCUSS YOUR RETURN WITH Anyone else: NO____, IF YES____, PROVIDE name or names and relationship of the individual(s).

Name _____ Phone _____ Name _____ Phone _____

SIGNATURES x _____ x _____ Date _____