

NAME \_\_\_\_\_

## 2024 QUESTIONNAIRE

While you are getting your paperwork together, please take to moment to answer the following:

Any changes in your marital status, dependents, address, phone numbers or e-mail addresses?

Any crypto/virtual currency activity in 2024?

Any foreign accounts in 2024?

Please provide driver's license information - license number, state of issue, issue date, and expiration date.

- 1) Taxpayer:
- 2) Spouse:

Have there been any changes in your direct deposit/debit account? If so, please provide a voided check with the updated information.

In addition, do you have:

Health insurance through healthcare.gov?

Unemployment compensation?

Did you buy, sell, or refinance your home? Provide closing statement.

Any energy efficient improvements to your home? Provide invoice and details.

**Any other income besides what you have received on tax forms?**

**Please bring in all your tax forms and any other tax paperwork.**

The following deductions can be used on the Arizona return in addition to the standard deduction:

Charitable contributions → List each charity, amount and attach receipt or letter from charity.

Long term care insurance premiums → List each payment and attach receipts.

529 (education savings account) plan contributions → List each beneficiary and amount contributed in 2024.