

Tax Questionnaire – 2024

Please answer the following questions as appropriate for your tax situation:

How would you like to receive and sign for your finalized tax returns?

Pickup in Henrietta: ____ Electronically via Email: ____ Pickup in Brockport: ____

In the event you were to receive a refund, how would you like your refund?

Refund Direct Deposit: ____ Refund via Check: ____ Apply to 2025 Estimated Tax: ____

If you have a tax balance due to the IRS or a state, how would you like to pay this?

I will pay by check or online, myself: ____ Auto-debit from bank account: ____

General Questions:

Are you a veteran of the US military? Yes ____ No ____

Are you clergy? Yes ____ No ____

Are you permanently disabled? Yes ____ No ____

Tax Return Questions:

Do you own a business? Yes ____ No ____

Do you own rental properties? Yes ____ No ____

Did you send any family member, friend or other individual more than \$18,000 in 2024?

Yes ____ No ____

Do you receive K-1's? Yes ____ No ____

Did you sell any cryptocurrency in 2024? Yes ____ No ____

Do you have any bank or financial accounts overseas, or receive any gifts from overseas?

Yes ____ No ____

Updates:

Please list below any major changes to your tax situation since last year (ex. Newly married, divorced, new child born, moved residences, house sales) anything you would like us to be aware of for this year:
