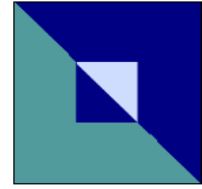


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Certified Public Accountants

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Client Questionnaire - 2024 Tax Return

The Internal Revenue Service (IRS) matches information returns/forms with amounts reported on tax returns. Accordingly, all information returns reflecting amounts reported to the IRS are also mailed or delivered to the taxpayers in an envelope clearly marked "IMPORTANT TAX DOCUMENTS ENCLOSED" and should be submitted with this organizer.

Forms such as:

W-2 (Wages)	1099-R (Retirement)	1099-MISC (Rents, etc.)	Charitable Contribution Statements
W-2G (Gambling Winnings)	1099-INT(Interest)	1099-G (Unemployment)	Annual Brokerage statements (and revised)
1098 - Mortgage Interest	1099-DIV (Dividends)	1099-K (Third Party Payments)	HUD-1 (Real Estate Sales/Purchases)
1098-T (Education)	1099-B (Brokerage Sales)	1099 (any other)	Schedule K-1
Other Tax information statements	1099-NEC (Non-Employee Compensation)	1095 (Health Insurance)	

FILL OUT SHADED AREAS ONLY IF YOU ARE A NEW CLIENT OR ANY INFORMATION HAS CHANGED FROM PREVIOUS YEAR:									
Name		Social Security	Date of Birth	Occupation		Disabled			
Taxpayer									
Spouse									
Street Address				City		State	Zip		
**Taxpayer Drivers License or State ID # State: Date Issued: Expires:				E-mail Address:		Phone Number			
						Alt Phone Number			
**Spouse Drivers License or State ID # State: Date Issued: Expires:				Email Address:		Phone Number			
						Alt Phone Number			
Dependents Name (First, Last)		Relationship	Social Security #	Date of Birth	Disabled				

**Refunds may be delayed without ID information.

Please answer the following questions to determine your maximum deductions:

DEPENDENT INFORMATION	Please Circle
Did your marital status change during the year (by December 31, 2024)?	Yes No Not Sure
Were there any births, deaths, marriages, divorces, or adoptions in your immediate family?	Yes No Not Sure
Did you or your spouse retire or change jobs in 2024?	Yes No Not Sure
Were there any changes in dependents from the prior year?	Yes No Not Sure
<i>If yes, explain: _____</i>	
Did you have any children under the age of 19, or a full-time student under age 24 with unearned income of more than \$1,300?	Yes No Not Sure
Do you have dependents who must file a tax return?	Yes No Not Sure
Did you have any dependent care costs?	Yes No Not Sure

HEALTH INSURANCE	Please Circle
Did you or any member of your family enroll in health insurance coverage through the Health Insurance Marketplace at healthcare.gov under the Affordable Care Act?	Yes No Not Sure
<i>If yes, please enclose your form 1095A Health Insurance Marketplace Statement.</i>	
Do you currently have a Health Savings Account?	Yes No Not Sure
<i>If yes, please provide any 2024 contributions, distributions and the year end amount _____</i>	

INCOME INFORMATION	Please Circle
Did you receive unemployment?	Yes No Not Sure
Did you have gambling winnings or losses this past year?	Yes No Not Sure
Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly?	Yes No Not Sure
Did you receive any disability income during the year?	Yes No Not Sure
Did you earn, receive, sell, send, exchange, gift or otherwise dispose of Virtual Currency or other digital assets such as NFTs?	Yes No Not Sure
Did you receive any other income or engage in bartering?	Yes No Not Sure

(CONTINUE ON BACK)

PURCHASES, SALES, DEBT INFORMATION	Please Circle
Did you sell, exchange, or purchase any real estate during the year?	Yes No Not Sure
Did you acquire or dispose of any stock during the year?	Yes No Not Sure
Did you sell an existing business, rental, or other property this year?	Yes No Not Sure
Did you have any debts canceled or forgiven this year, such as a home mortgage, credit cards, or student loan(s)?	Yes No Not Sure
Did you purchase a qualified plug-in electric drive vehicle or qualified fuel cell vehicle this year?	Yes No Not Sure
Did you go through bankruptcy proceedings?	Yes No Not Sure

ITEMIZED DEDUCTION INFORMATION	Please Circle
Did you make any cash charitable contributions? <i>If yes, please provide the amount:</i>	Yes No Not Sure
Did you make any noncash charitable contributions (clothes, furniture, etc.)?	Yes No Not Sure
Did you make any major purchases during the year (cars, boats, etc.)?	Yes No Not Sure
Did you pay property tax this year?	Yes No Not Sure
Did you pay mortgage interest?	Yes No Not Sure
Did you incur expenses as a K-12 educator?	Yes No Not Sure
Did you incur a loss of property from a natural disaster or theft?	Yes No Not Sure

MISCELLANEOUS INFORMATION	Please Circle
Did you, or do you plan to, contribute to an IRA (Traditional or Roth) for 2024? <i>If yes, please provide type of IRA and amounts for you, spouse, and/or dependents</i>	Yes No Not Sure
Did you pay any individual \$2,600 or more to perform household services such as babysitting, landscaping, or caregiving?	Yes No Not Sure
Did you give a gift of more than \$18,000 to one or more people?	Yes No Not Sure
Did you install any energy efficient improvements to your main residence (new construction and rentals do not apply, such as solar electric or water heating, fuel cell, wind energy, geothermal heat, biomass stoves; or energy efficient improvements such as exterior windows, doors, and skylights, furnaces, A/C, or water heater)?	Yes No Not Sure
Did you have a financial interest in foreign financial assets such as a bank account, trust, or business?	Yes No Not Sure
Do you owe back child support or any other debts that could affect your return?	Yes No Not Sure
Do you have any unpaid sales/use tax for tax year 2024 (such as from goods you purchased online or from a catalog)?	Yes No Not Sure
Did you make any Federal and/or State estimated tax payments for the 2024 tax year? <i>If yes, please provide the payment dates & amounts for all payments during 2024 & 2025 to date</i>	Yes No Not Sure
Have you set up an online account at IRS.gov?	Yes No Not Sure
Have you ever received and ID Protection PIN from the IRS? <i>If yes, please provide the current PIN Letter</i>	Yes No Not Sure

EDUCATION INFORMATION	Please Circle
Did you have any educational expenses during the year on behalf of yourself, spouse, or a dependent(s)?	Yes No Not Sure
Did you pay interest on a student loan for yourself, your spouse, or your dependent(s) during the year?	Yes No Not Sure
Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program (529 Plan) during the year?	Yes No Not Sure
Did you cash any U.S Savings Bonds Series EE and/or I ?	Yes No Not Sure
Would you like a FAFSA Worksheet completed with your return?	Yes No Not Sure

DIRECT DEPOSIT OR REFUND	Please Circle
Would you like to have your refund(s) directly deposited into your account?	Yes No Not Sure

FILL OUT ONLY IF YOU ARE A NEW CLIENT OR ANY INFORMATION HAS CHANGED FROM PREVIOUS YEAR:

ACCOUNT:

Name of Financial Institution- _____

Name on Account- _____

Financial Institution Routing Transit Number- _____

Your Account Number- _____

Type of Account- Checking Traditional Savings Other *Please Specify*

We will prepare your 2024 Federal and State income tax returns using information you provide to us. We may ask for clarification of some items, but will not audit or otherwise verify the data to discover errors or omissions, should any exist. We will perform accounting services only as needed to prepare your tax returns and will not verify or audit your records. In instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select. The following Questionnaire will help organize important information in order to facilitate an efficient preparation of your return.

To the best of my knowledge the information enclosed in this client tax organizer is correct and includes all income, deductions, and other information necessary for the preparation of this year's tax returns for which I have adequate records.

Taxpayer _____

Date _____

Spouse

Date