

ABLRE Tax 2024 Questionnaire

Name

Answer all questions and sign last page. Mark Y(es) or N(o) and include tax forms or follow-up information.

Taxpayer		SSN
Email		Preferred phone #
Occupation	Date of Birth	IRS provided IPIN
Spouse		SSN
Email		Preferred phone #
Occupation	Date of Birth	IRS provided IPIN
Current address		
City	State	Zip Code

Dependents- List dependent names, date of birth, Social Security number, relationship

- Y N Did you add or lose any dependents that you were able to claim last year? Explain.
- Y N Are any of your dependents required to file a tax return? Full time students?
- Y N Did you pay for dependent care? If yes, include provider information.

During 2024, did you:

- Y N Change marital status? Change jobs or retire? Move?
- Y N Make any transactions involving digital assets?
- Y N Make gifts with a total value of \$18,000 or assist with the purchase of an asset (home, auto)for any individual?
- Y N Own any foreign assets or have any interest/authority over a financial account in a foreign country?
- Y N Receive correspondence from the IRS or WDOR during the year? Provide a copy.
- Y N Make any out of state purchases that the seller did not collect sales tax?
- Y N Make any estimated quarterly tax payments? If yes, provide details.

Income

Include forms or information from all sources of income. This includes wages, alimony , awards, barter, cryptocurrency, foreign income, gambling, grants, hobby, lottery winnings, inheritance, taxable scholarships, and unemployment benefits.

- Y N Do you have any self-employment income? Is this new ? Include all business income and expenses.
- Y N Are you required to file any 1099s? If so, have you done so?
- Y N Did you purchase/ sell/ replace any assets for this business?

Investments

Provide all 1099s and K-1 forms, including interest, dividends, capital gains and losses, rent and royalty, partnership, S-corporations, farm and trust income.

- Y N Did you purchase or sell a business, rental property or interest in a partnership or S-corporation?
- Y N Did you sell or purchase any real estate, including your home? Include closing statements.
- Y N Do you have ownership in any LLC, partnership or S-corporation? Have you filed the BOI report?

Retirement or Severance

- Y N Did you receive an distribution form an IRA, pension or annuity?
- Y N Did you receive Social Security benefits during the year?
- Y N If over age 70 1/2, did you make any qualified charitable distribution directly from an IRA?
- Y N Did you contribute to a ROTH IRA or convert an existing IRA to a ROTH IRA?

Healthcare

- Y N Did you obtain healthcare coverage through the Marketplace? Include all forms 1095-A.
Amount paid for any health, dental, vision or supplemental medical insurance premiums (not through an employer). _____
Amount paid for long-term care insurance. _____
- Y N Did you make any contributions to an HSA (health savings account)? Include form 5498-SA.
- Y N Did you receive any distributions from an HSA (health savings account) ? Include form 1099-SA.

Deductions and Credits

- Amount paid for out-of-pocket medical expenses. _____
- Y N Did you pay real estate taxes? Include tax bill. Or amount of rent paid to your landlord in 2024.
- Y N Did you pay mortgage interest on your home and /or second home> Include form 1098.
- Y N Did you take out a home equity loan or line of credit? Explain what it was used for.
- Y N Did you purchase a clean vehicle that qualifies for a tax credit? Provide sales receipt.
- Y N Did you make any home improvements that qualify for home energy tax credits, such as solar panels, windows, doors, HVAC, heap pumps, etc.? You will need to provide documentation.
- Y N Did you make any cash or non-cash contributions?

Education

- Y N Did you or your spouse or dependents incur any post-secondary education expenses? Provide form 1098-T and expenses.
- Y N Did you pay any student loan interest?
- Y N Did you pay any Wisconsin K-12 private school tuition?
- Y N Did you make any contributions to a 529 (i.e.EdVest) plan?
- Y N Did you take a distribution from a 529 plan? Include form 1099-Q and document expenses.

We acknowledge that we have answered the questions to the best of our ability.

Signature

We would like to receive our copy of the completed tax return via: (circle one)

Office Pickup

Mail

Digital/Paperless

Bank name

Routing #

Acct #

checking or savings

If we have a refund, we would like: direct deposit

paper check

applied to 2026

We would like direct debit of: balance due

federal estimates

WI estimates

Notes to the preparer: