

NAME _____ **PHONE** _____ **DATE** _____

EMAIL _____

******* We strongly recommend that you let us facilitate your balances due, and have your refunds directly deposited. We also believe it is in your best interest that you allow us to electronically file all of your estimated payments. The reason being if a mishap (on your part or ours) occurs it is much easier for us to determine the error and correct it faster and easier if we initiated the transaction. If you prefer us not to do this and we need to investigate for any reason, because of the time involved we will have to bill you for this which we have not billed for in the past. *******

Please select **YES** or **NO** for each of the following questions: **Yes** **No**

Did you receive, sell, send, or exchange any digital assets in any virtual currency? (Bitcoin/Crypto)

Do you have an LLC / Corporation / Partnership? Active or inactive? 2024 Corporate Transparency Act

Did you live, work, own real estate in a foreign country; receive benefits or gifts from foreign sources?

Did you own any interest in a partnership; start or dispose of a business this year?

Did you receive a 1099-K (from PayPal/google/internet, cash aps) or 1099-Misc (prizes/awards) or 1099-NEC?

Did you receive any K-1's, K-2's or K-3's

Did you pay tuition or put money into a Nebraska college or ABLE savings plan?

Did you have a Health Savings Account? / a Marketplace Plan 1095A?

Did you withdraw from a mutual fund or sell a stock?

Did you contribute, convert, or withdraw a pension plan or IRA (Roth/Traditional)?

Did you receive any correspondence from the IRS or NE Dept. of Rev?

Did you make estimated tax payments?

Do you plan to apply for Social Security in 2023?

Did you transfer a home from a parent to a child or other person?

Did you give a gift of more than \$17,000 to one or more people?

Can you be claimed as a dependant by another taxpayer?

Were there any Births, Deaths, Divorces, Marriages, or Adoptions in 2023?

Did you provide a home for or help support another person? Any disabled children under 21?

Do you have any *Consumer Use Tax* to report for 2023? (Internet purchases)

SELECT any items that pertain to you or your spouse:

- Alimony Scholarships Grants Savings Bonds Jury Duty Unemployment Compensation Prizes
- Bonuses Awards Gambling Winnings Unreported Tips Commissions Worker's Compensation Disability
- Veteran's Pension Installment Sale Payments State Tax Refund income from another state
- rental property sell or purchase a home refinance any loan bankruptcy cancel debt identity theft
- barter Airbnb online sales any other income?

******* Fill out below only if you are filing Head of Household: *******

Yes **No**

Were you single or legally separated for the last half of the year? (Need copy of separation agreement or divorce decree)

Did a qualifying child or dependent live with you for at least half of the year?

Did you provide more than 1/2 the costs of maintaining a home for you and dependent?