

**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/BOI

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? File a BOI

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 2025?

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 2024?

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 2024? (Internet purchases)

Did you replace windows, door, heat, air conditioning, water heater, or solar?

**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?