

Yes No

Question / Response Continued

Did you BUY _____ SELL _____ RECEIVE _____ or SEND _____ cryptocurrency in 2024? Please mark all that apply and provide us with more information regarding the transactions.

Did you start a new business during 2024?

Did you purchase rental property during 2024? If YES, see the question below.

Do you own rental property? If YES, please visit the 2024 Tax Year section of our website for the required questionnaire.

Did you sell an existing business, rental, or other property during 2024?

Did you purchase a new or used plug-in electric vehicle in 2024? If YES, please provide the buyer's agreement.

Did you make an energy efficient improvement to your home in 2024? If YES, please provide documentation. *Please visit the 2024 Tax Year section of our website for general examples.

Did you gift anyone \$18,000 or more in dollars or property? If YES, a gift tax return is needed.

Was there a change in your dependents? If YES, please select a box below:

[] Add Dependent Name: _____ Date of Birth: _____ SSN: _____

[] Remove Dependent Name: _____ Reason for Removal: _____

Do you have a dependent that filed their own tax return? If YES, please provide a copy.

Do you have a child, aged 17-23, whom is a student and had lived with you for over half the year (whether away at college or not) OR a non-child relative that you supported?

Did you pay childcare costs for a dependent child under age 13 so you could work? If YES, please complete the "Childcare Information" section below.

Did you or your child go to college full time (6 credits) for at least one semester? If YES, please provide tuition (1098-T), room, board, supplies, etc. and mark which year of college:

[] Freshman [] Sophomore [] Junior [] Senior

Did you make any contributions to an education savings or 529 plan account?

Were distributions from a 529 plan used to pay for your child's tuition, room, board, etc.? If YES, please provide 1099-Q.

Did you make any estimated tax payments? If YES, please complete the section below.

Would you like estimated tax payment vouchers? These are to pay estimated tax liabilities quarterly, for the current tax year, 2025. These are in addition to any withholdings you may already have via a W-2.

Estimated Tax Payment Information

Table with 6 columns: Date of Payment, Amount, Paid to: Fed/State/Local, Date of Payment, Amount, Paid to: Fed/State/Local

Childcare Information

Table with 5 columns: Child's Name, Provider Name, Address, EIN, Cost

NEW CLIENT SECTION

Please provide a copy of your previous year's tax return and complete the information below.

Table with 4 columns: Name, Date of Birth, Social Security Number, and rows for Taxpayer, Spouse, Dependent, Dependent

Referred by: _____

By signing below, you verify that all data given to David C. Bryant, CPA, may be used in preparation of your 2024 individual income tax returns.

Signature of Interviewee

Date of Interview