

# 2024 Tax Organizer Questionnaire

Please answer the following questions to the best of your ability and attach all requested documents.

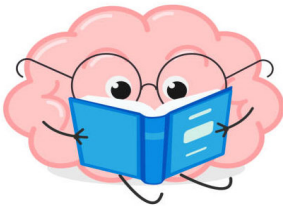


## General Information

Question	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Org. Page	Inclusion Reminders and Other Information
1 Do you want paper copies of your tax returns?	<input type="checkbox"/>	<input type="checkbox"/>		Nominal fee applies.
2 Do you want paper vouchers for estimates and/or balances due?	<input type="checkbox"/>	<input type="checkbox"/>		Nominal fee applies and we do NOT recommend!
3 We will send your e-file signature forms by RightSignature so that they can be signed electronically. If you do NOT want to sign your e-file forms electronically, check the NO box.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	→	By checking NO, we will not use RightSignature for your electronic e-file signatures. You will be responsible for returning your e-file forms by delivery, email or fax.
4 Did you receive ANY correspondence from the IRS or state agencies?	<input type="checkbox"/>	<input type="checkbox"/>		Include all correspondence not previously provided to us.
5 Do you want to allocate \$3 to the Presidential Election Campaign Fund:				
For yourself?	<input type="checkbox"/>	<input type="checkbox"/>		
For your spouse?	<input type="checkbox"/>	<input type="checkbox"/>		
6 If you are a California taxpayer, did both you and all members of your household have minimum essential healthcare coverage in 2024?	<input type="checkbox"/>	<input type="checkbox"/>		<b>**Answer Required**</b>
7 Did you receive an IRS PIN notice (CP01A) for your 2024 tax returns?	<input type="checkbox"/>	<input type="checkbox"/>		These are NOT provided to all taxpayers. If you had an IRS identity protection PIN last year, this notice <u>will be</u> mailed every January and is required to e-file your tax returns. Use the following link to retrieve lost or missing IP PIN's: <a href="https://www.irs.gov/identity-theft-fraud-scams/retrieve-your-ip-pin">https://www.irs.gov/identity-theft-fraud-scams/retrieve-your-ip-pin</a>
<p>Important information about filing your 2024 federal tax return  <b>We assigned you an Identity Protection Personal Identification Number</b></p>				
8 Do you want to allocate part of your California refund to any of the state designated charities?	<input type="checkbox"/>	<input type="checkbox"/>		A complete list is available at our website under F&P Highlights. See "FTB State Designated Charities"
9 Did you know that if you fill out this questionnaire from start to finish, F&P will enter you into a contest to win \$50 from a store of your choice?	<input type="checkbox"/>	<input type="checkbox"/>		You would like your winning gift card from _____ (indicate "F&P" if you'd prefer a credit for F&P services).
10 Did you make a gift exceeding \$18,000 to a single individual during 2024?	<input type="checkbox"/>	<input type="checkbox"/>		Provide name, address, SSN of recipient(s) & date of gift(s).

## Income

Question	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Org. Page	Inclusion Reminders and Other Information
11 In 2024, did you have any of the following:				
Wages?	<input type="checkbox"/>	<input type="checkbox"/>	10	Include form(s) W-2
Non-employee compensation?	<input type="checkbox"/>	<input type="checkbox"/>	14.1	Include form(s) 1099-NEC
Gambling income?	<input type="checkbox"/>	<input type="checkbox"/>	13.2	Include form(s) W-2G
Rebate income?	<input type="checkbox"/>	<input type="checkbox"/>	14.1	Provide details
Interest income?	<input type="checkbox"/>	<input type="checkbox"/>	11	Include form(s) 1099-INT
Dividend income?	<input type="checkbox"/>	<input type="checkbox"/>	12	Include form(s) 1099-DIV
Social security benefits?	<input type="checkbox"/>	<input type="checkbox"/>	14.1	Include form(s) SSA-1099
State income tax refunds?	<input type="checkbox"/>	<input type="checkbox"/>	14.2	Include form(s) 1099-G
Unemployment compensation?	<input type="checkbox"/>	<input type="checkbox"/>	14.2	Include form(s) 1099-G
Cancellation of debt?	<input type="checkbox"/>	<input type="checkbox"/>	14.1	Include form(s) 1099-C
Health savings account (HSA) distributions?	<input type="checkbox"/>	<input type="checkbox"/>	32.1	Include form(s) 1099-SA
Education savings accounts or qualified tuition program distributions?	<input type="checkbox"/>	<input type="checkbox"/>	14.3	Include form(s) 1099-Q
Long term care benefit payments?	<input type="checkbox"/>	<input type="checkbox"/>	14.1	Include form(s) 1099-LTC
Receipts exceeding \$5,000 transacted through any single third-party settlement organization (aka payment apps & online marketplaces), such as Venmo, Square, PayPal, eBay, Ticketmaster, etc (personal included)?	<input type="checkbox"/>	<input type="checkbox"/>	14.1	Include form(s) 1099-K. These aren't necessarily taxable, but the reporting threshold has decreased to \$5,000 for 2024 (\$2,500 in 2025) and should be reported if a 1099 is received. All amounts need to be included in the organizer.
Foreign income?	<input type="checkbox"/>	<input type="checkbox"/>		



## Children & Dependents

Question	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Org. Page	Inclusion Reminders and Other Information
12 Do any of your dependent children file their own tax returns? If yes, did they claim their own exemption?	<input type="checkbox"/>	<input type="checkbox"/>	2	Your tax return will be rejected if your child files their own tax return and does NOT indicate they are claimed as a dependent on someone else's tax return!
13 Were your dependent children (who are <u>over</u> age 18) full-time students in 2024?	<input type="checkbox"/>	<input type="checkbox"/>	2	
14 Did your dependent children (who are age 18 or <u>under</u> ) have investment income in excess of \$2,600?	<input type="checkbox"/>	<input type="checkbox"/>	2	

Don't forget to take a break from all the exciting tax questions to take a stab at our 2024 trivia!

**1. What was Oxford Dictionary's 2024 word of the year?**


## Children & Dependents (continued)

	Question	Yes ✓	No ✓	Org. Page	Inclusion Reminders and Other Information
15	Are you claiming a dependent child who did not live with you for at least one-half of the year?	<input type="checkbox"/>	<input type="checkbox"/>	2	If yes, attach Form 8332 if your spouse is the custodial parent.
16	Did you pay over 50% support for a parent?	<input type="checkbox"/>	<input type="checkbox"/>	2	If yes, you may be able to claim them as a dependent.
17	Did you pay any dependent care expenses for a child or a parent?	<input type="checkbox"/>	<input type="checkbox"/>	33.1,33.2	Need name, address, and EIN/SSN for all daycare providers.

## Foreign Reporting

	Question	Yes ✓	No ✓	Org. Page	Inclusion Reminders and Other Information
18	At any time during 2024, did you own or have signature authority over a foreign bank account with a balance in excess of \$10,000 USD?	<input type="checkbox"/>	<input type="checkbox"/>		Tax returns due 4/15/25 (automatic 6-month extension). If you will file your own FIN CEN form, initial here _____
19	Do you own any foreign financial assets (including partnership interests, hedge funds and private equity funds) with a FMV in excess of \$50,000 at 12/31/24 or in excess of \$75,000 at any time during 2024?	<input type="checkbox"/>	<input type="checkbox"/>		Foreign stock maintained in a U.S. based brokerage account is excluded. However, foreign stock not maintained in a financial account is included.
20	At any time during 2024, did you have an online gambling account with a balance in excess of \$10,000 USD?	<input type="checkbox"/>	<input type="checkbox"/>		

## Retirement Plans

	Question	Yes ✓	No ✓	Org. Page	Inclusion Reminders and Other Information
21	Did you receive any distributions from an IRA, profit-sharing plan, or other retirement plan? If yes, have you ever made a non-deductible contribution in a previous year?	<input type="checkbox"/>	<input type="checkbox"/>	13.1	Include form(s) 1099-R  This will be excludable as return of principal.
22	What is the total value of ALL of your traditional IRA'S at 12/31/24? Taxpayer \$ _____ Spouse \$ _____ [do not include Roth's]				<b>Required if you received IRA distributions in 2024!</b>
23	Did you roll over any distributions into a regular IRA within 60 days? Provide rollover amount and date _____	<input type="checkbox"/>	<input type="checkbox"/>	13.1	Include form(s) 1099-R
24	Did you roll over any distributions into a Roth IRA within 60 days? Provide rollover/conversion amount and date _____	<input type="checkbox"/>	<input type="checkbox"/>	13.1	Include form(s) 1099-R
25	If you are at least 70-1/2, did you transfer IRA funds directly to a charity in 2024?	<input type="checkbox"/>	<input type="checkbox"/>	13.1	Include form(s) 1099-R and provide amount transferred. Do <u>not</u> also enter IRA to charity contributions on page 25 as itemized deductions.
26	Excluding contributions made through an employer plan (reflected on your 2024 W-2), have you made any retirement plan contributions for 2024?	<input type="checkbox"/>	<input type="checkbox"/>	24	Be sure to complete page 24 with amount(s), dates and account type(s).
27	Do you want to make a 2024 retirement plan contribution for yourself? If the contribution is not deductible, do you still want to make it? If you still want to make it, do you prefer it to be to a Roth IRA? Do you want the extra catch-up if you are age 50+ at 12/31/24? Do you want the maximum contribution allowed? If no, what amount do you want to contribute? \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	24	All IRA's must be deposited by April 15, 2025, even if you file an extension.  The maximum 2024 catch-up contribution is \$1,000 for all IRA's, \$3,500 for SIMPLE, and \$7,500 for SEP.
28	Do you want to make a 2024 retirement plan contribution for your spouse? If the contribution is not deductible, do you still want to make it? If you still want to make it, do you prefer it to be to a Roth IRA? Do you want the extra catch-up if you are age 50+ at 12/31/24? Do you want the maximum contribution allowed? If no, what amount do you want to contribute? \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	24	

## Business Income and Expenses (sole proprietorships only)

	Question	Yes ✓	No ✓	Org. Page	Inclusion Reminders and Other Information
29	Did you purchase or start a new business?	<input type="checkbox"/>	<input type="checkbox"/>	16	Include any purchase documents.
30	Did you receive any business income from bartering or trades?	<input type="checkbox"/>	<input type="checkbox"/>	16	These are reportable as income.
31	Did you receive any business income from virtual currency?	<input type="checkbox"/>	<input type="checkbox"/>	16	These are reportable as income.
32	Does your business accept merchant cards and/or third party payments (i.e. credit cards or PayPal)?	<input type="checkbox"/>	<input type="checkbox"/>	16	Include any form 1099-K's.
33	Did you sell items online?	<input type="checkbox"/>	<input type="checkbox"/>	16	Include any form 1099-K's.

## Business Income and Expenses (continued)

	Question	Yes ✓	No ✓	Org. Page	Inclusion Reminders and Other Information
34	Did you have any income related to the cannabis industry, including but not limited to the growth, manufacture or distribution of cannabis or a derivative thereof?	<input type="checkbox"/>	<input type="checkbox"/>	16	
35	Did you pay any person or business (excluding corporations) for a business related service in the amount of \$600 or more? If yes, did you file a 1099-NEC on the payee's behalf?	<input type="checkbox"/>	<input type="checkbox"/>	16	<i>1099-NEC's and/or 1099-MISC's must be distributed to the recipient(s) by 1/31/25. Non-filed 1099's could lead to lost business deductions in the event of an IRS audit.</i>
36	Did you purchase or dispose of any business assets (furniture or equipment)?	<input type="checkbox"/>	<input type="checkbox"/>	16p2	<i>Provide the item description, date placed in service, (NOT 22) cost or sales price and if the item is new or used.</i>
37	Did you pay for any business meals & entertainment in 2024?	<input type="checkbox"/>	<input type="checkbox"/>	16	<i>If so, be sure to provide separate totals for meals and another for entertainment.</i>
38	Do you have an accounting procedure established to treat amounts paid for depreciable items costing \$2,500 or less as an expense, instead of capitalizing?	<input type="checkbox"/>	<input type="checkbox"/>		<i>This applies to business &amp; rental property owners only. We recommend signing the annual capitalization policy statement <b>available at our website</b>.</i>
39	Did you use your car on the job, other than commuting to/from work?	<input type="checkbox"/>	<input type="checkbox"/>	22 p3 or 30 p2	
40	Did you purchase an automobile in 2024 used for business? If yes, is the gross vehicle weight between 6,000 and 14,000 pounds? Is it greater than 14,000 pounds?	<input type="checkbox"/>	<input type="checkbox"/>	22 p3	<i>Include the purchase or lease contract.</i>
41	Did you start a new automobile lease in 2024 used for business?	<input type="checkbox"/>	<input type="checkbox"/>	22 p3	<i>Include the lease agreement.</i>
42	Was any part of your home used exclusively for business or rented out?	<input type="checkbox"/>	<input type="checkbox"/>	29	<i>Include square footage (total house and business use).</i>
43	Were either you or your spouse self-employed AND paying for health insurance for yourself or your family?	<input type="checkbox"/>	<input type="checkbox"/>	24	<i>This includes adult children under age 27 as of 12/31/24.</i>
44	Did you purchase or refinance any rental real estate? If yes, number of years for mortgage _____	<input type="checkbox"/>	<input type="checkbox"/>	18	<i><b>Include final settlement statement</b>, forms 1098, 2024 activity statements, and details for use of any cash back.</i>
45	Did you convert a personal residence into rental real estate? If yes, the market value on the date it was converted was \$ _____	<input type="checkbox"/>	<input type="checkbox"/>	18	
46	Did you have an ownership interest in any of the following: Partnership or LLC? S-Corporation? Trust? <i>(This does <b>not</b> include your own living trust.)</i>	<input type="checkbox"/>	<input type="checkbox"/>	20.1 20.2 20.3	<i>Include ALL pages of any form(s) K-1.</i>
47	Do you have unreimbursed business expense for a partnership or S-corporation? If yes, could you have been reimbursed?	<input type="checkbox"/>	<input type="checkbox"/>	30	<i>The partnership or S-corporation agreement must indicate that these expenses are non-reimbursable to qualify as a deduction.</i>

## Gains and Losses

	Question	Yes ✓	No ✓	Org. Page	Inclusion Reminders and Other Information
48	Did you sell any stocks, bonds, or other investment property? <i>Note:</i> Do NOT hand-write each transaction in the organizer. We accept and prefer electronic information.	<input type="checkbox"/>	<input type="checkbox"/>	17	<i>Include form(s) 1099-B for stock sales <u>and</u> ALL pages of realized gains and losses from your broker. Be sure to check for missing cost amounts!</i>
49	Did you sell any "qualified small business stock"?	<input type="checkbox"/>	<input type="checkbox"/>	17	<i>There are specific rules to qualify for this exclusion.</i>
50	Did you buy, sell, or receive an award of employer stock?	<input type="checkbox"/>	<input type="checkbox"/>	17	<i><b>Include your paystub(s) corresponding to the pay period(s) any income was recognized &amp; your final paystub for 2024.</b></i>
51	Did you acquire, send, sell, or exchange any virtual currency in 2024 (including Bitcoin, Ethereum, NFT's, etc)?	<input type="checkbox"/>	<input type="checkbox"/>	17	<i>Contact us if you had any of these transactions in the past that you did not already report.</i>
52	Did you exercise any employer stock options?	<input type="checkbox"/>	<input type="checkbox"/>	17	<i>Include all exercise statements and employer supplied documentation to establish the tax basis.</i>
53	Did you acquire any employer restricted stock and make an IRC 83(b) election?	<input type="checkbox"/>	<input type="checkbox"/>	17	<i>Provide a copy of the election as this needs to be included with your federal tax return going to the IRS.</i>
54	Did you sell or exchange any <u>business</u> or <u>rental</u> real estate?	<input type="checkbox"/>	<input type="checkbox"/>	17	<i>Include form(s) 1099-S &amp; settlement statements.</i>
55	Did you sell a principal residence? Was it used as a principal residence for at least 2 of the last 5 years? Was it ever rented? Was it acquired by any of the following: Inheritance or gift? IRC 1031 exchange? Reinvestment from a prior residence sold before May 7, 1997? Did you receive a homebuyer credit for the property in 2008 - 2010?	<input type="checkbox"/>	<input type="checkbox"/>	17	<i>Include ALL settlement statements.</i>
56	Does an <u>unrelated</u> party owe you money which became uncollectible in 2024?	<input type="checkbox"/>	<input type="checkbox"/>	17	<i>We will need the name, address, date of original loan, list of payments received and amount of loss.</i>



## Gains and Losses (continued)

	Question	Yes <input checked="" type="checkbox"/>	No <input checked="" type="checkbox"/>	Org. Page	Inclusion Reminders and Other Information
57	Did you incur a loss because of damaged or stolen property (including disaster or flood losses) that exceeds 10% of your income OR that was related to your business?	<input type="checkbox"/>	<input type="checkbox"/>	17	Include specific details, including date of loss, original cost, insurance reimbursement, value at time of loss and description of item(s) damaged or stolen.
58	Did you steal any property in 2024?	<input type="checkbox"/>	<input type="checkbox"/>		Yes, it's our annual joke question and we know this doesn't apply to any of <b>our</b> clients, but believe it or not, illegal income is always taxable, including reporting the fair market value of any stolen property. So if you're considering nabbing the Mona Lisa, don't forget you'll still need to report the ~\$870M value on your tax returns for your year of procurement!
59	Did you live in a Presidentially declared 2024 disaster area?	<input type="checkbox"/>	<input type="checkbox"/>	17	<a href="https://www.fema.gov/disasters/disaster-declarations">https://www.fema.gov/disasters/disaster-declarations</a>

## Personal Deductions and Credits

	Question	Yes <input checked="" type="checkbox"/>	No <input checked="" type="checkbox"/>	Org. Page	Inclusion Reminders and Other Information
60	Did you include in the organizer all real property taxes paid?	<input type="checkbox"/>	<input type="checkbox"/>	25	
61	Did you include in the organizer all fees paid to the DMV for personal vehicle registrations? Number of vehicles included _____	<input type="checkbox"/>	<input type="checkbox"/>	25	You can look up your DMV payments at: <a href="https://www.dmv.ca.gov/wasapp/FeeCalculatorWeb/vlffForm.do">https://www.dmv.ca.gov/wasapp/FeeCalculatorWeb/vlffForm.do</a> or find it on your DMV registration slip.
62	Did you purchase a new vehicle, aircraft, or boat?	<input type="checkbox"/>	<input type="checkbox"/>	25	Include the purchase contract.
63	Did you have long-term care insurance or pay for long-term care services?	<input type="checkbox"/>	<input type="checkbox"/>	25	If self-employed, use page 24 instead of page 25.
64	Do you have documentation from your charities for ALL charitable contributions that you included in the organizer? Were any of these donations for a fundraising event (i.e. auction)?	<input type="checkbox"/>	<input type="checkbox"/>	25	For donation substantiation requirements, go to our website and click F&P Highlights. "Goods or services received" are not deductible.
65	Did your total <b>NON</b> -cash donations exceed \$500?	<input type="checkbox"/>	<input type="checkbox"/>	26	We need a detailed list of descriptions, dates & charities.
66	Did you donate a vehicle valued over \$500?	<input type="checkbox"/>	<input type="checkbox"/>	26	Include form(s) 1098-C, original cost & purchase date.
67	Did you move during 2024? If yes, date you moved _____ If yes, date your spouse moved _____	<input type="checkbox"/>	<input type="checkbox"/>		Be sure to update your address on page 1 of the organizer, if not already updated. <b>If you moved to a new state, all income needs to be allocated by state.</b>
68	Did you incur moving expenses due to a change of employment?	<input type="checkbox"/>	<input type="checkbox"/>	27	No longer deductible for IRS, but some states allow.
69	Did you pay interest on a higher education loan?	<input type="checkbox"/>	<input type="checkbox"/>	24	Include form(s) 1098-E
70	Did you pay for tuition, books or required computers for higher education?	<input type="checkbox"/>	<input type="checkbox"/>	38	Include form(s) 1098-T
71	Do you OWN an HSA (Health Savings Account)?	<input type="checkbox"/>	<input type="checkbox"/>	32.1	Include your 12/31/24 statement, regardless of whether you had any contributions or distributions in 2024.
72	Did you make a contribution to an HSA in 2024? If yes, amount contributed (if NOT already on W-2) _____	<input type="checkbox"/>	<input type="checkbox"/>	32.1	Include form(s) 5498-SA (including annual earnings). Contribution deadline for 2024 is 4/15/25.
73	Did you install any solar energy property or battery storage technology to your principal residence?	<input type="checkbox"/>	<input type="checkbox"/>		Include all purchase documents and manufacturers' certifications.
74	Did you install energy efficient home improvements such as doors, windows, skylights, insulation, A/C units, water heaters, heat pumps, furnaces/boilers, panels/circuit upgrades, or other potential eligible items?	<input type="checkbox"/>	<input type="checkbox"/>		Include all purchase documents and provide a list of any rebates received for the improvements. Heads up for 2025 - for many of these improvements, manufacturers must now provide you with a PIN to receive the credit. Be sure to ask!
75	Did you receive a rebate for an energy efficient auto or any other energy efficient improvement or purchase in 2024?	<input type="checkbox"/>	<input type="checkbox"/>	14.1	This includes any rebate, excluding rebates directly provided by the manufacturer. Examples include a local agency, government unit or utility company.
76	Did you purchase an electric drive/clean vehicle (used or new) in 2024? If yes, date vehicle was actually received _____	<input type="checkbox"/>	<input type="checkbox"/>		Include the entire purchase contract from dealer. <b>NEW! The dealer must provide you with Form 15400, Clean Vehicle Seller's Report, to verify the vehicle qualifies for the credit.</b>

## Mortgages and Debts

	Question	Yes <input checked="" type="checkbox"/>	No <input checked="" type="checkbox"/>	Org. Page	Inclusion Reminders and Other Information
77	Did you pay mortgage interest?	<input type="checkbox"/>	<input type="checkbox"/>	25 p2	Include form(s) 1098 and lender 12/31/24 statement.
78	Did you refinance or take a home equity loan in 2024? If yes, term of new debt: <input type="checkbox"/> 15 yrs <input type="checkbox"/> 30 yrs <input type="checkbox"/> Other _____ If proceeds were received, provide a list of how the proceeds were used.	<input type="checkbox"/>	<input type="checkbox"/>	25 p2	Include refinance final settlement statement, forms 1098 and lender annual activity statements. Cash received or debts paid off through a refinance have specific rules. Be sure to provide all details.
79	Did you pay interest on a home equity line of credit? If yes, provide lender statement(s) with balance at 12/31/24.	<input type="checkbox"/>	<input type="checkbox"/>	25 p 2	Interest is not deductible if proceeds used for personal purposes, regardless of loan origination date. Include form(s) 1098 (or equivalent).
80	Did you have a real estate foreclosure or short sale in 2024?	<input type="checkbox"/>	<input type="checkbox"/>		Include form(s) 1099-A and/or 1099-C.

## Mortgages and Debts (continued)

	Question	Yes ✓	No ✓	Org. Page	Inclusion Reminders and Other Information
81	Do your total outstanding mortgage balances on all personal residences exceed \$1 million (or \$750,000 if home was purchased after 12/15/17)? (This does not include rentals, business, or investment properties.)	<input type="checkbox"/>	<input type="checkbox"/>		<i>If yes, we need the balances for all loans at 12/31/24! Provide year-end lender statements for all mortgages or provide a list of all loan balances at 12/31/24.</i>
82	Did you declare bankruptcy in 2024?	<input type="checkbox"/>	<input type="checkbox"/>		<i>Include the final bankruptcy decree.</i>
83	Did you receive a homebuyer credit for a 2008 home purchase?	<input type="checkbox"/>	<input type="checkbox"/>		<i>Repayment of this credit began in 2010 for 15 years.</i>

## Tax Withholdings, Estimates, and Payments

	Question	Yes ✓	No ✓	Org. Page	Inclusion Reminders and Other Information
84	Did you pay ALL of your 2024 estimates that F&P provided with your 2023 tax returns (see your 2023 cover letter)?	<input type="checkbox"/>	<input type="checkbox"/>	3	<i>This is important and avoids unnecessary government notices! Review &amp; complete organizer pg 3 to indicate estimates paid for 2024.</i>
85	If you have an overpayment do you want it direct deposited?	<input type="checkbox"/>	<input type="checkbox"/>	3	<i>Confirm bank information on final tax returns!</i>
86	If you have a balance due, do you want it directly debited from your bank account? If yes, date you want your account debited _____	<input type="checkbox"/>	<input type="checkbox"/>	3	<i>The balance due will be withdrawn from the account of your choice. Unless otherwise requested, this will be the same account used for direct deposit.</i>
87	If you have a balance due, do you need an installment agreement to pay the taxes?	<input type="checkbox"/>	<input type="checkbox"/>		<i>There are additional government handling fees. For information on setting up your own payment plan, go to F&amp;P Highlights on our website.</i>
88	Do you want us to prepare your 2025 estimated tax payments? If yes, do you want all or part of your 2024 overpayment applied to your 2025 estimates?	<input type="checkbox"/>	<input type="checkbox"/>		<i>We are no longer providing paper vouchers, unless specifically requested.</i>
89	If you pay estimates, do you want them directly debited from your bank account each quarter for 2025?	<input type="checkbox"/>	<input type="checkbox"/>	3	<i>The amounts will be withdrawn from the account you have included in the organizer.</i>
90	Do you want to purchase <i>paper</i> Series I savings bonds with a portion of your federal tax refund? Maximum is \$5,000 per taxpayer.	<input type="checkbox"/>	<input type="checkbox"/>		<i>We will contact you before completion to confirm refund amount available and your choice of denomination.</i>
91	Did you purchase any items acquired out-of-state, online, or by mail-order from an out-of-state retailer that did not include sales tax? <b>For California taxpayers only:</b> If yes, did any one purchase exceed \$1,000? If yes, indicate the total amount of purchases in 2024 \$ _____ If no, you can use <i>either</i> a safe harbor or the actual amount. <input type="checkbox"/> Use safe harbor <input type="checkbox"/> Use actual purchases, which is \$ _____	<input type="checkbox"/>	<input type="checkbox"/>		<i>Be sure to keep adequate records and report ALL purchases that did not include sales tax for your state of residency.</i>  <i>The safe harbor is approximately 0.035% of your adjusted gross income (i.e. \$66 if AGI is \$190,000).</i>
92	Did you pay wages of \$2,800 or more during the year to household workers, not including amounts paid to an agency?	<input type="checkbox"/>	<input type="checkbox"/>		<i>Include payroll reports. The W-2 to your employee is due by 1/31/25.</i>
93	Do you want us to review your withholding amounts for 2025?	<input type="checkbox"/>	<input type="checkbox"/>		<i>Please send us year-to-date paystubs after 5/1/25.</i>

Remember - "more is better" when deciding what documents to send us. More and more detail is being required by the IRS and state agencies. Additionally, it takes us less time to prepare a tax return when we have all documents available. We'll return all originals.



Quiz Answers

1. Brain rot; 2. Moo Deng; 3. Nvidia; 4. Sweden; 5. China