

2024 PERSONAL AND INCOME INFORMATION WORKSHEET

Must Be Filled In as Completely as Possible (Use Your 2023 Return as a Guide)

Your Name _____ Your Social Security Number _____
First MI Last

Spouse's Name _____ Spouse's Social Security No _____
First MI Last

Address: _____
Street City State Zip

TELEPHONE NUMBERS (please include area code) Home _____ Your Work _____ Spouse's Work _____

CELL PHONE NUMBERS (please include area code) Yours _____ Spouse's _____

OCCUPATIONS - Yourself _____ Your Spouse _____

DATE OF BIRTH - Yourself _____ Your Spouse _____ Email address: _____
MO DAY YEAR MO DAY YEAR

If entire family covered by health insurance all year check here. Did you own or spend any Virtual Currency in the calendar year?

At anytime throughout the year, did you have more than \$10,000 in a Foreign Bank Account?

| DEPENDENT INFORMATION | Date of Birth | Social Security Number | Relationship | Months Lived in Your Home in 2024 |
|-----------------------|---------------|------------------------|--------------|-----------------------------------|
| Full Name _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |

Do you want any refunds due you directly deposited to your checking or savings account? ___Yes ___No If yes, is the information provided last year still accurate? ___Yes ___No (If no, we need current routing number and account number) (Please Bring all W-2s, Forms 1099 and Other Documents Indicating Income Received)

1. Total WAGES earned: (optional - we will add this up for you) \$ _____ 2. TIPS RECEIVED but not reported to your employer: \$ _____

3. INTEREST INCOME: (Please bring Forms 1099 or Year End Statements)

If you received interest income from a seller financed mortgage in 2024, bring name, address & social security number of payer—this is an IRS requirement.

| Payer's Name | Amount | Payer's Name | Amount |
|--------------|--------|--------------|--------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

4. DIVIDEND INCOME: (Please bring Forms 1099 or Year End Brokerage Statements)

| Payer's Name | Gross Dividends | Payer's Name | Gross Dividends |
|--------------|-----------------|--------------|-----------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

5. ALIMONY RECEIVED: \$ _____ ALIMONY PAID: \$ _____ - SSN of Person the Alimony was Paid to - _____

6. UNEMPLOYMENT COMPENSATION RECEIVED: \$ _____

7. SOCIAL SECURITY PAYMENTS received: Yourself \$ _____ Your Spouse \$ _____

8. If you SOLD stocks, real estate or other assets in 2024, bring all pertinent papers. If you had STOCK TRANSACTIONS, please bring brokerage buy and sell slips or a detailed listing. **We need to know when you bought the stock and how much you paid for the stock!**

9. MISCELLANEOUS INCOME not shown elsewhere - SOURCE: _____ Amount: \$ _____

10. I have an TRADITIONAL IRA or a ROTH IRA. How much paid in 2024? \$ _____ How much paid in 2025 for 2024? \$ _____

11. If you PURCHASED REAL ESTATE in 2024, bring ALL escrow papers.

12. ESTIMATED TAX PAYMENTS FOR 2024 (DO NOT INCLUDE WITHHOLDING FROM W-2s or BALANCE paid from the previous return)

| FEDERAL | | | | CALIFORNIA | | | |
|-----------|----------|-----------|----------|------------|----------|-----------|----------|
| Date Paid | Amount | Date Paid | Amount | Date Paid | Amount | Date Paid | Amount |
| 1. _____ | \$ _____ | 2. _____ | \$ _____ | 1. _____ | \$ _____ | 2. _____ | \$ _____ |
| 3. _____ | \$ _____ | 4. _____ | \$ _____ | 3. _____ | \$ _____ | 4. _____ | \$ _____ |

**(Over for Deductions Information Worksheet) -- IF YOU ARE A NEW CLIENT,
PLEASE BRING COPIES OF YOUR 2023 FEDERAL AND CALIFORNIA RETURNS**