GREGORY L BUHROW, CPA, PC

Clear All

Tax Year: 2024

Very Important > Answer each applicable item

Client Name: ____________________________ **Spouse Name:** ____________________________

☐ Married Filing Jointly ☐ Single ☐ Head of Household ☐ Married Filing Separately

Required:

Email > Client _________________________________ Spouse: _________________________________

Cell phone > Client ______________________________ Spouse: ______________________________

Driver license > ☐ Client copy included ☐ Spouse copy included (State, Number, Issue and Expiration date)

Tax return copies sent > ☐ 2023 ☐ 2022 (*One year mandatory*) IRS Identity-theft PIN > ☐ Letter(s)

☐ Okay for IRS to discuss processing of return with preparer (*lasts for one year, until 4/15/2024*)

☐ **Mail to client** (Postage applies) ☐ **Email via secure portal**

☐ **Estimated tax PAID >** ☐ Payment records attached

E-Filing: PIN signature: ☐ First 5 digits of SSN OK? If **No**, then: Taxpayer _________ Spouse _________

Bank account: ☐ Checking ☐ Savings ☐ Copy of voided check ☐ Use same account for Fed/state

Routing number: ____________________ **Account number:** ________________________________

Refund: ☐ Direct deposit ☐ Check ☐ Apply **Due:** ☐ Direct debit ☐ IRS Pay ☐ Check ☐ EFTPS

Other income? ☐ No ☐ Yes $_________ (*documentation*) ____________________________________

Cryptocurrency? ☐ No ☐ Yes ☐ 8949 from broker **Foreign bank acct?** ☐ No ☐ Yes _______________

☐ Child with: ☐ Earned; ☐ Unearned income Amount $ ______________________

☐ Unemployment compensation $____________________ State: ____ (include Form 1099-G)

☐ **Standard Deduction** MFJ - $29,200; Single - $14,600; HOH - $21,900; > 65 +$1,550/$1,950

Itemized Deductions ☐ Form 1098 ☐ Property tax (paid in 2024) ☐ Charitable contributions

☐ Sales tax ☐ State Income Tax ☐ Casualty in declared disaster area

☐ Medical expenses ☐ Summary documentation included

Credits/Other

☐ Home office: ☐ Regular and exclusive use Sq footage __________ Total home sq ft ____________

☐ EITC/CTC/ODC Any additional credits? ☐ Residential ☐ Vehicle ______________________________

☐ College: AOTC/LLC ☐ Form 1098-T plus ☐ List of all college expenses $_____________ (Excel)

For **Traders in Securities** > ☐ Trading expenses

For **Mark-to-Market Traders** > ☐ MTM Election included ☐ Making MTM Election for 2025 (by 4/15/2025)

Trading entity exists: ☐ Yes ☐ No; Beneficial Ownership Information Reporting required (but on hold)

Additional information: ____

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