

BOUNDS ACCOUNTING & TAX SERVICES, LLC

2024

BASIC TAXPAYER INFORMATION		
	Taxpayer	Spouse
<u>First Name</u>		
<u>Middle Initial</u>		
<u>Last Name</u>		
<u>Social Security Number</u>		
<u>Date of Birth</u>		
<u>Date of Death (if applicable)</u>		
<u>Occupation</u>		
<u>County</u>		
<u>Street Address</u>		
<u>City, State, Zip Code</u>		
<u>Best # to contact you</u>		
<u>Email Address</u>		
Legally Blind?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Eligible to be claimed as a dependent on another return	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Did you move to/from another state during this tax year?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you live in city limits?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
<u>Pennsylvania Residents Only - School District</u>		

FILING STATUS

Single
 Married Filing Jointly
 Married Filing Separately
 Check this box if you did not live with spouse at any time during the year
 Check this box if your spouse itemizes deductions
 Head of Household - If the qualifying person is a child but not your dependent, enter the child's name and SSN
 Name _____ Social Security # _____
 Qualifying Widower - Year spouse died _____

DEPENDENT INFORMATION

First Name	MI	Last Name	Date of Birth	Social Security Number	Relationship	Months lived in home

CLIENT NAME _____

BEST WAY TO BE CONTACTED? (circle one) PHONE / EMAIL _____

DOCUMENT CHECKLIST

- W-2's Mortgage Stmt(s) Business or Farm Info
- 1099's Tuition Stmt(s) 1095A
- SSA-1099 Property Tax Info Rental Info
- K-1's Charitable Contributions Settlement sheets from any real estate transaction

2024 Estimated Payment Confirmation – list payment amount & date paid

	Federal Amount	Date Paid	State Amount	Date Paid
1 st Quarter				
2 nd Quarter				
3 rd Quarter				
4 th Quarter				

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ELECTRONIC DEPOSIT/PAYMENT OPTION

DIRECT DEPOSIT/DIRECT DEBIT

You have the option of having your refund direct deposited or your balance due automatically withdrawn from your bank account. We will need a copy of a voided or cancelled check to verify your bank information. **Please do not send a deposit slip! Initial below to indicate that you would like to take advantage of this option as applicable:**

2024 Federal tax return (Please initial)
 _____ Direct Deposit
 _____ Automatic withdrawal

2024 State tax return (Please initial)
 _____ Direct Deposit
 _____ Automatic Withdrawal

Attach Voided Check Here

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CLIENT QUESTIONNAIRE

1) At any time during 2024, did you receive (as a reward, award, or payment for property or services); or exchange, gift, or otherwise dispose of a digital asset or a financial interest in a digital asset? (for example: cryptocurrency)

YES _____ NO _____

2) Do you have any foreign bank accounts or foreign investments?

YES _____ NO _____