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2024

NEW CLIENTS: Please include a copy of your 2023 tax return.

Taxpayer Name: _____ DOB: _____ Occupation: _____

Spouse Name: _____ DOB: _____ Occupation: _____

Address: **If not the same as 2023** _____

BEST PHONE NUMBER: _____ EMAIL ADDRESS: _____

DEPENDENTS: IF NEW OR NOT THE SAME AS LAST YEAR.

Name, DOB, Relationship, Social Security Number, # of months in your home

DID YOU GET A NEW DRIVERS LICENSE IN 2023? If so, we'll need the following info from it.

Taxpayer	Spouse
9 Digit DL #:	9 Digit DL #:
Issue Date:	Issue Date:
Expiration Date:	Expiration Date:
First three characters of Doc ID:	First three characters of the Doc ID:

****Document ID on back of DL, first three after IDUSA if Enhanced DL****

DO YOU HAVE AN IDENTITY PROTECTION PIN issued by the IRS? We will need it to Efile.

DID YOU COLLECT UNEMPLOYMENT? If so, you must get your 1099-G online.

Do you have any interest in or authority over any foreign bank account or trusts? Y or N

Virtual Currency: Did you receive, sell, exchange, give or dispose of any digital assets? Y or N

Did you make any home improvements that may qualify for energy credits? Y or N

Year-end information documents such as:

- W-2's for wages
- 1099's for: interest (1099-INT), dividends (1099-DIV), stock sales (1099-B Consolidated Stmt)
- Miscellaneous income earned (1099-MISC)
- Non-Employee Compensation (1099-NEC)
- Social Security received (SSA-1099)
- Pension, Annuity, and IRA income received (1099-R)
- W-2G's for Gambling Winnings

IF YOU PLAN TO ITEMIZE: Mortgage interest (Form 1098), real estate taxes paid, charitable donations (with receipts for each donation exceeding \$250), medical expenses itemized.

DO YOU HAVE HEALTH INSURANCE THROUGH THE ONLINE MARKETPLACE? If so, we'll need Form 1095-A

As a NYS resident did you make out of state purchases that would have been subject to sales tax if purchased in NY? Y or N

ADDITIONAL TAX DOCUMENTS:

- Do you have a dependent in college? **Tuition information** for Education Credits: 1098-T and transaction history (Bursar's Report) for calendar year 2024
- Did you pay **Student Loan interest**? Amount
- Did you receive a **1099-C for cancellation of debt: CC, student loan, etc.**
- Did you make any **IRA contribution**? Type: Roth or Traditional and the Amounts
- Did you make any **contributions or take distributions to/from a NYS 529 Plan**? Amounts
- Did you receive your **STAR credit by check**? If so, how much was it?
- Did you make any **Estimated Tax payments**? Amounts and payment dates.
- Did you pay for **Childcare**? Provider's name, address and federal ID number. Also, the amount paid to the provider for each dependent.
- Do you have **Long Term Care Insurance**? Amount of premium paid.
- Did you **buy or sell a house**? Bring your closing paperwork including settlement statements.
- Do you **have rental property**? Total your income and summarize your expenses by category (i.e. supplies, repair, advertising, capital improvements, etc.) and bring the depreciation history if this is your first year at H&E
- Do you have any income from a "side gig"... Uber, Lyft, Doordash, AirBNB, Ebay, Etsy, Amazon, etc. Are you an independent contractor or do you have a small business?** Total your income (1099-NEC) and summarize your expenses by category. Bring your business banks statements and check register. If equipment or buildings are part of the business, we need the depreciation history if this is your first year at H&E.
- Did you receive a 1099-K?** What for? Include copy.
- Did you **purchase an electric vehicle** that may qualify for tax credits?

Office Use:

Last Name: _____

Drop Off Date: _____

Direct Deposit/Debit Acct Info Confirmed:

Checking or Savings

Bank: _____

Acct Last 4: _____

- Identity PIN copied
- NYS Sales tax
- Driver's License