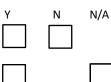


Client Name		

Tax Planning Questionnaire

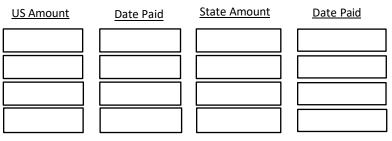
For the Year Ending December 31, 2024

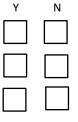
Please check the box in response to each question and provide details where applicable.



Did you have a substantive change in income from last year?

If your prior year return included estimated tax payments for the current year did you make any of the payments (if yes, provide dates and amounts).





Did you have any changes to your dependents in the current year? Did you invest in/ sell an interest in a business?

Did you buy or sell any real estate (personal residence, rental property, land, etc)? If yes, please provide details in the box below.

Did you have substantial gains or losses in your investment portfolio?

Did you buy or sell any real estate (personal residence, rental property, land, etc)? If yes, please provide details in the box below.

## **Additional Details**