



Planche • Politz • Ledet *LLC*  
Beyond the Numbers

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.

- |                          |                          |                          |  |
|--------------------------|--------------------------|--------------------------|--|
| Y                        | N                        | N/A                      |  |
| <input type="checkbox"/> | <input type="checkbox"/> |                          | Did you have a substantive change in income from last year?  |
| <input type="checkbox"/> |                          | <input type="checkbox"/> | 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). |

<u>US Amount</u>	<u>Date Paid</u>	<u>State Amount</u>	<u>Date Paid</u>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- |                          |                          |  |
|--------------------------|--------------------------|--|
| Y                        | N                        |  |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you have any changes to your dependents in the current year? Did you invest in/ sell an interest in a business?                    |
| <input type="checkbox"/> | <input type="checkbox"/> | Did you buy or sell any real estate (personal residence, rental property, land, etc)? If yes, please provide details in the box below. |
| <input type="checkbox"/> | <input type="checkbox"/> | 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**