

Please let us know if any of the changes apply to you!

Client Name/s _____ Tax Year 2024

1. Were either claimed as a dependent on another's return? **Yes or No** _____

2. In tax year, did surviving spouse get married again? **Yes or No** _____

3. In tax year & prior to death, did they get divorced? **Yes or No** _____

If yes above give date of final divorce _____

4. Did either change their name at social security? **Yes or No** _____

If yes, we need their new social security card

5. Did they buy or sell your home (Prior to Death)? **Yes or No** _____

6. Is there a new mailing address? **Yes or No** _____

7. Did they purchase anything outside of their home state, including online?
(Exception 1 – If they live in Alaska, Delaware, Montana, New Hampshire, or
Oregon this is N/A)

((Exception 2 – Eating out at restaurants out of town, motel, hotel, and tickets for
events and/or places including cruises)

Yes or No _____

If yes, how much did they spend out of state? _____

(This is the amount they did not pay VA Tax on)

8. During the tax year, did they have a foreign bank account, signature authority on a
foreign account, or foreign assets?

Yes or No _____

9. Are they claiming any new dependents or no longer claiming any dependents?

Yes or No _____

10. Is there tax information included for anyone besides this client including if it is for a business, trust, or estate?

Yes or No _____

11. At any point in the year, did they or their spouse receive, sell, send, exchange, or acquire any interest in any Virtual Currency? (Example: Bitcoin)

Yes or No _____

This Next Section: For Single Member LLCs & Sole Proprietors Only

1. Did the business buy or sell any assets? **Yes or No** _____
(Example: Vehicles, Computers, Power Tools, Furniture, Electronics)
2. Did the business pay anyone to help them that they paid more than \$600 over the course of the year (Do not include employees that a W-2 was issued on)?

Yes or No _____

Note: Businesses, please go fill out a Profit & Loss form if you do not have a profit and loss from a bookkeeping or one you prepared yourself already, which you can get on our website

Printed Name Above of Executor or Representative:

Signature Above of Executor or Representative:

Date Signed:

Printed Name Above of Spouse or their Executor or Representative:

Signature Above of Spouse or their Executor or Representative:

Date Signed: