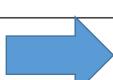


Firm Foundation, Solid Solutions

Taxpayer's Full Name:	Spouse's Full Name (if married):				
Taxpayer's Social Security Number:	Spouse's Social Security Number:				
Taxpayer's Date of Birth:	Spouse's Date of Birth:				
Taxpayer's Occupation Title:	Spouse's Occupation Title:				
Taxpayer's Mobile Phone Number:	Spouse's Mobile Phone Number:				
Taxpayer's Email Address:	Spouse's Email Address:				
Mailing Address (including zip code):					
Home Phone Number:					
What County did you and your spouse live in as of January 1, 2024?					
(Indiana Residents only)					
What County did you and your spouse work in as of January 1, 2024?					
Taxpayer Spouse					
On December 31st were you: Single, Married, or if Married but living a	part since what date				
Is there a signed Form 8332 or a divorce decree that allows someone	else to claim your children?YESNO				
If you claim Head of Household, do the children live with you more tha	an 6 months of the year?YESNO				
Can your parents or someone else claim you on their return?YES	NO				
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First Name		Birth Date (Mo/day/year)		Relationship	Lived with you all year Y/N	Childcare/ Preschool Y/N	College Y/N	Private School Y/N
	Last Name		SSN	to you				



Did you pay Real Estate Taxes last year?YESNO
Do you have a home equity loan or line of credit?YESNO (If it was not used soley for home improvement, it is not deductible)
Did you pay any amounts to an Ex-Spouse for alimony AND/OR maintenance for a divorce prior to 12/31/18?YESNO
If yes then enter your Former Spouse's Name & SSN
Did you receive any income in the form of alimony or maintenance from a divorce prior to 12/31/18?YESNO
Did you pay any Child Care Expenses (Nanny, Pre-school, before/after care)YESNO If yes, how much?
Name Provider EIN# or SSN#
Provider's Address
Did you make any of the following Energy Improvements to your MAIN home in 2024?YESNO QUALIFIED Doors, Windows, Skylights, Insulation, Water Heater, Furnace, AirConditioner - See Energy Star's website for requirements QUALIFIED Solar Electric Systems, Solar Water Heaters, Fuel Cell Property, Small Wind Energy Property, or Geothermal Heat Pumps
Will you be claiming any education credits?YESNO (You must have a 1098-T)
Will you be claiming any interest paid on student loans?YESNO (You must have a 1098-E)
Any Personal Property Taxes? (Ex. Excise tax on license plates, <u>this does not apply in IL</u>)YESNO
Any unearned income? (Ex. Dividends from stocks, Bank Interest from savings)YESNO
Did you have Medical, Dental, or Vision expenses in excess on 7.5% of your income?YESNO
Did you make any cash contributions or non-cash donations to charities and have receipts?YESNO
Did you contribute to an IRA (Individual Retirement Account) in 2024 or will you before 4/15/2025?YESNO
If yes, was it a Roth IRA or a Traditional IRA?
Did you have any 1099-R Retirement Distributions?YESNO
Did you have any self-employment income?YESNO
Did you sell any stocks or bonds?YESNO
Did you receive, sell, exchange, or dispose of any financial interest in digital assets (ie. Cryptocurrency, BitCoin?)YESNO
Did you have any rental property income?YESNO
Did you have any Social Security income?YESNO
Are there any years that you did not file your taxes?YESNO
If Yes, what years haven't been filed?
Did you send in Quarterly Estimated Federal or State tax payments?YESNO
Did you buy a vehicle, building materials, boat or make any other LARGE purchase incurring a LARGE amount of sales tax?YESNO
(Indiana Residents only)
Did you pay rent?YESNO If yes, how many months did you pay rent?
How much was your monthly rent? \$
Landlord's Name
Landlord's Address
Cornerstone Tax Service, Inc. (Accountant) will prepare our personal or corporate income tax returns based on information we will present to
accountant. Cornerstone Tax Service, Inc. will perform due dilligence but will not audit or otherwise verify the data we submit. The accountant performance of the information, or for additional information. It is the accountants recommendation to the property of the information
may ask us for clarification of some of the information, or for additional information. It is the accountants responsibility to prepare our tax return correctly according to the law and the information that we have provided. It is our responsibility to provide the accountant with all
the information required to prepare complete and accurate returns. Our tax return cannot be filed until all forms are signed and returned
to the office. I declare that to the best of my knowledge and belief what is stated above is correct, complete and is truly stated.
Taxpayer's Signature Date
Spouse's Signature Date