

WEST & COMPANY CPA PC RETURNING CLIENT PROFILE

Name(s): _____ & _____

We prefer to email; may we email you with questions? (Preferred email below)

Best phone: ____ - ____ - _____

1. Who are you claiming as dependents in 2024? First Name(s) Only:

2. Did you? **(Circle)**

A. No marital status changes during 2024

B. Get Married in 2024

C. Get Divorced in 2024

D. My spouse passed away 2024

3. Did you move to a New Address during 2024? **If not, skip.**

When did you move? (Local Return Purposes) _____

New Address: _____

4. Did you buy, sell or inherit any property in 2024? **If not, skip.**

Provide Settlement Sheets.

If you sold property- We need the original settlement sheet from purchase and sale!

5. Do you have a Health Savings Account (HSA)? **Not an FSA. If not, skip.**

We will Need the:

Form 1099-SA (Distributions)

Form 5498-SA (Contributions)

6. Did you have Marketplace health insurance during this tax year? **If not, skip.**

You Must Provide: Form 1095-A

7. Digital Assets (Crypto, NFTs, etc)

Digital Assets	At any time during 2024, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
-----------------------	---	--

8. Estimated payments must be listed on your tax return by date and amounts paid.