WILLIAMS-KNOPP, INC.
JONATHAN J. WILLIAMS, MBA
ENROLLED AGENT

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Dear Client(s):

This is your tax return questionnaire for tax year 2024.
Please complete and return it as soon as possible.

All necessary documents must accompany the completed form, including W2's, 1098's, 1099's, HEALTH INSURANCE FORMS 1095, and K-1's etc. Please MAIL, FAX, EMAIL OR SECURE UPLOAD the form back to us with copies of the documents and any other item or information that you wish us to review and consider.

If you itemize your deductions, please put the total of your expenses in the appropriate spaces.

(Note: personal credit card interest expenses and other personal interest are not deductible).

All individuals who make estimated tax payments must include a record of the payments made for the tax year of 2024.

The IRS has substantial penalties for late filing and late payment of income tax. Many people wait to the last minute to file their returns and miss out on deductions that they could have taken if they were not pressured to make the tax deadline. In addition, many wait to make an appointment waiting for a few additional documents.

We suggest that you wait until you have most of your information together and then send it in to us so that we may start your return. Additional information can be sent in as soon as it is received and eliminate last-minute arrangements.

I would like to thank you for your continued patronage.

Feel free to refer us to your friends and family for their tax and accounting needs.

We offer a free half-hour phone consultation for all new clients, non-filers, and to review the previous year's tax returns.

Please call if you have any questions.

Sincerely,
Jonathan J. Williams, MBA, EA
(Remember that if you owe tax, you will pay additional interest and penalties if you file after April 15th, 2025)

TAX RETURN QUESTIONNAIRE 2024 FORM 1040

LAST NAME:	FIRST:	SPOUSE
CHILDREN-----AGE---SOCIAL SECURITY NUMBER	ADDRESS	
- -	CITY	
- -	STATE / ZIP	
- -	EMAIL:	
OTHER DEPENDENTS-NAMES & SSN'S	PHONE # HOME	
- -	PHONE # WORK	
WAGES-ATTACH ALL COPIES OF W-2'S	**RENTAL PROPERTY INCOME AND EXPS**	
INTEREST -ATTACH YEAR END STATEMENTS	DAYS RENTED__________	PERS DAYS______
DIVIDENDS-ATTACH YEAR END STATEMENTS	RENTAL INCOME	$
PENSION,MISC.ETC-ATTACH YEAR END STATEMENTS	ADVERTISING EXP.	$
SOCIAL SECURITY-ATTACH YEAR END STATEMENTS	AUTO & TRAVEL	$
UNEMPLOYMENT COMP-ATTACH STATEMENTS	MAINTENANCE/CLEANING	$
ATTACH K-1 STATEMENTS & BROKERAGE STATEMENTS	INSURANCE	$
"S" CORPORATION INCOME - ATTACH K-1	LEGAL/PROF FEES	$
GAMBLING WINNINGS-ATTACH FORMS	1ST MTG.INTEREST	$
DEDUCTIONS / CREDITS- ATTACH FORMS	OTHER INTEREST	$
TRAD IRA (H)-AMT FOR YEAR=$	REPAIRS	$
TRAD IRA(W)-AMT FOR YEAR=$	SUPPLIES	$
SEP/IRA (H)-AMT FOR YEAR=$	REAL ESTATE TAXES	$
SEP/IRA (W)-AMT FOR YEAR=$	UTILITIES	$
SIMPLE IRA (H)-AMT FOR YEAR=$	FURNITURE **	$
SIMPLE IRA (W)-AMT FOR YEAR=$	APPLIANCES **	$
ROTH IRA (H)-AMT FOR YEAR=$	IMPROVEMENTS **	$
ROTH IRA (W)-AMT FOR YEAR=$	**ATTACH INVOICES**	$
MEDICAL EXPENSES-DRS.,HOSP.ETC=$	COST OF PROPERTY***	$
MEDICAL INSURANCE=$_______DRUGS=$_____	DATE PURCHASED***	
TAXES-REAL ESTATE=$_____$_____$_____	ATTACH HUD1***	
INTEREST-HOME MTG.=$_______+$________	**SELF EMPLOYED BUSINESS**	
HOME EQUITY LOANS=$________+$________	GROSS INCOME	$
EDUCATION EXP / CREDITS- ATTACH STATEMENTS	PURCHASES	$
CONTRIBUTIONS IN CASH/CHECK $_________	SUBCONTRACT LABOR	$
CONTRIBUTIONS OF PROPERTY $__________	MATERIALS/SUPPLIES	$
CASUALTY LOSSES-EXPLAIN IN DETAIL	ADVERTISING	$
GAMBLING LOSSES-ATTACH DETAIL	AUTO EXPENSE-Attach Log	$
FOREIGN BANK ACCOUNTS - ATTACH DETAILS	BANK CHARGES	$
	COMMISSIONS PAID(1099)	$
CHILD CARE - AGE OF CHILD_____	INTEREST EXPENSES	$
NAME OF CHILD	INSURANCE	$
NAME OF PROVIDER	PROF, & LEGAL FEES	$
ADDRESS OF PROVIDER	OFFICE/MISC EXPENSE	$
AMOUNT PD $_______	RENT EXPENSE EQUIP	$
TAX ID # OF PERSON/BUSINESS PAID_______	RENT EXPENSE OFFICE	$
ESTIMATED TAXES -PAID QUARTERLY (1040 ES)	REPAIRS	$
1st Qtr $________	TRAVEL ON BUSINESS	$
2nd Qtr $________	UTILITIES,PHONE	$
3rd Qtr $________	EQUIP BOUGHT IN YR**	$
4th Qtr $________	**ATTACH INVOICES	
TOTAL FOR THE YEAR = $ ______________		
SEND TO : JONATHAN J. WILLIAMS, MBA, EA	*** * USE WHOLE DOLLARS ONLY-NO CENTS**	
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