Davis, Nagy & Company LLC
1000 S Cleveland-Massillon Rd Ste 119, Fairlawn, OH 44333
(330) 665-9405 (Phone) (330) 937-9140 (Fax)
www.davisnagycpa.com

2024 TAX QUESTIONNAIRE

Please make sure this questionnaire is saved to your computer before you fill it out.

Davis, Nagy & Company LLC holds the right to ask for paper documentation of any or all of the information provided.

General Information

	TAXPAYER		SPOUSE
			Complete the applicable spouse fields if married as of Dec. 31, 2023
Last Name:		Last Name:	
First Name:		First Name:	
Middle Initial:		Middle Initial:	
Social Security #:		SSN or ITIN:	
Date of Birth:		Date of Birth:	
Current Employer:		Current Employer:	
Occupation in 2024:		Occupation in 2024:	

Filing Status: ☐ Married Filing Joint ☐ Married Filing Separate ☐ Head of Household ☐ Single
(Select one)

Deductions: ☐ Standard ☐ Itemized
(Select one)

Referred By: ______ *(new clients)*

Contact Information

Primarily, you will be contacted by email.

Email	next to primary email address	**Telephone:**	
Email Work: ☐		Work	
Email Personal: ☐		Mobile	
Email Other: ☐		Home	

Current Address: (street, city, state, zip) From (mm/dd/yy) To (mm/dd/yy)

Mailing Address for IRS correspondence, if different (i.e., PO Box, work address, etc.)

Residency & Employers

Complete if you lived at any other location during 2024:
Taxpayer (T), Spouse (S), Joint (J)

T/S/J	Address (street, city, state, zip)	From (mm/dd/yy)	To (mm/dd/yy)

Employers during 2024:
Taxpayer (T), Spouse (S)

T/S	Employer:	Occupation	From	To	Where worked (state or country)

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Dependents

(Do not list spouse) First Name, Initial, Last Name	SSN or ITIN	Date of Birth (mm/dd/yy)	Relationship to You	Childcare Expenses While You Are At Work* (incurred & paid in 2024)

Dependent Childcare Expenses Incurred while you [and spouse] were working or looking for work

Care Provider's Name	Care Provider's Address	SSN or EIN	Amount Paid

☐ Check to indicate that you have been claimed as a dependent on **someone else's** tax return this year.

If you have a dependent child for whom you paid **college/university tuition**, please refer to the education worksheet

Direct Deposit & Electronic Funds Withdrawal

Name of US Bank ______ *(must be a US bank)*

● Checking ○ Savings

Routing Number ______ *(9-digit number on the bottom left of a check)*

Account Number ______

OR Voiced Check Attached ☐

Electronic Withdrawal of any Tax Balance Due
Please select a withdrawal date.

Note: If no date is selected, you will have to mail in a check for any tax balance due

☐ April 15 ☐ The date the tax return is e-filed

IRA Contributions

Tax Year 2024, maximum contribution is $7,000 per person (to age 49), and $8,000 (age 50 and older).
A 2024 IRA contribution can be made up to April 15, 2025.

	TAXPAYER	SPOUSE
IRA Traditional	$	$
or IRA Roth	$	$

(Note: please do not list 401K contributions. An IRA is something set up by you personally, not through your work.)

Mortgage Interest & Property Tax

Amounts for up to two residences (can be in the U.S. or abroad) that you lived in during 2024.
For rental properties, please list separately on the **Rental** worksheet.

	TAXPAYER	SPOUSE	JOINT	Reported on Form 1098
Mortgage Interest	$	$	$	☐
Primary residence	$	$	$	☐
and second home only	$	$	$	☐
	$	$	$	☐
	0	0	0	
Points Paid (if any)	$	$	$	☐
Property Tax (primary residence)	$	$	$	☐
Property Tax (second home)	$	$	$	☐

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Property Tax (additional homes) $ ____ $ ____ $ ____ ☐
0 0 0

Additional Information: Please check if any of these situations apply to you.

☐ Mortgage origination prior to December 16, 2017, the total of your mortgage balance(s) was more than $1,100,000 during 2024 (including primary home plus second home)

☐ Mortgage origination after December 15, 2017, the total of your mortgage balance(s) was more than $750,000 during 2024 (including primary home plus second home)

☐ You sold a home during 2024

Charitable Contributions

Must be to a Qualified U.S. Charity
Charitable contributions must be supported with a donation receipt, letter or bank record.
Contributions of clothing and household goods must be in good used condition or better.

	TAXPAYER	SPOUSE	JOINT
Cash, Checks, or Credit Cards	$	$	$
Noncash	$	$	$

***If noncash charity totals more than $500, please either email or fax us your receipts OR provide the following:**

Name of Charity	Address of Charity	Goods Donated (clothes, etc.)	Date Donated	Used Value

For values, go to: Salvation Army Donation Value Guide

Note: Donation of stock/securities is a non-cash donation.

Other Deductions/Expenses

Deductions:	TAXPAYER	SPOUSE	JOINT
Total Medical Expense	$ 0	$ 0	
Prescription	$	$	
Doctor visits	$	$	
Hospitals & Nursing homes	$	$	
Margin Interest	$	$	$
Personal Property Taxes	$	$	$
Adoption Expenses	$	$	$
Early Withdrawal Penalties	$	$	$
HSA Contribution for 2024 *(contributed by you, not your employer)*	$	$	

	TAXPAYER	SPOUSE	
Student Loan Interest Paid:	$	$	*(only interest is deductible, not principal)*

If your adjusted gross income is greater than $85,000 (single) or $170,000 (married), you cannot claim the deduction.

Tuition & Scholarships

If you or your spouse were a student during 2024, or you paid for your dependent child's college/university tuition, please complete the **Education** worksheet.

Checklist of Forms to Send Davis, Nagy & Company LLC

Generally, you do not need to fill out income amounts on the questionnaire as we can get them directly from tax forms that you have received from the payers. **Please scan & email, fax, mail or drop off all such forms.** For some items, additional information will be

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needed, see below.

Check each you received (or should receive) for 2024. You only need to send the form:

	TAXPAYER	SPOUSE	JOINT	
Wages (Form W-2)	☐	☐		
Self-Employment (Form 1099-NEC) *	☐	☐		*Also complete **Self Employment** worksheet
Interest (1099-INT)	☐	☐	☐	*Interest Income Statements
Dividends (1099-DIV)*	☐	☐	☐	*Dividend income statements
Sales of Securities (Form 1099-B) *	☐	☐	☐	*Also complete **Trades** worksheet
Unemployment Compensation (1099-G)	☐	☐		
Tax Overpayment (1099-G)*	☐	☐	☐	*State and local tax refunds received during 2024
Partnership/S-Corp/Trust/Estate (Sch. K-1)	☐	☐	☐	
Retirement Distributions (1099-R)*	☐	☐		*Pensions and annuities/Retirement plan distribution
Prizes and Awards	☐	☐		
Mortgage Interest (Form 1098)	☐	☐	☐	
Student Loan Interest (1098-E)	☐	☐		
Tuition Expense (Form 1098-T)	☐	☐		
HSA or Archer MSA (5498-SA or 1099-SA)	☐	☐		
2022 and 2023 Tax Return (New Clients Only)	☐	☐	☐	
Other Form 1099	☐	☐	☐	Specify:

For these items, please click on the link to provide additional information:

	TAXPAYER	SPOUSE	JOINT
Rental Income	☐	☐	☐
Foreign Income and/or Accounts*	☐	☐	☐

*Note: Potential fines have increased for not reporting foreign accounts with combined balances in excess of $10K.

Tax Credits

Check all that apply:

Elderly Credit	☐	Child Tax Credit	☐
Education Credit	☐	Child & Dependant Care	☐
Retirement Savings Contribution	☐	Adoption Credit	☐
Electric vehicle	☐	Other	☐

Specify:

State Sales and Use Tax

Total amount of sales tax you owe from out of state purchases: $

For example, you are an Ohio resident and lived in Akron all year which has a 6.75% sales tax rate. In 2024, you purchased, tax free, goods online or out of state totaling about $1,000 (excluding the shipping and handling charges). You would report $67.50 of sales tax.

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Estimated Tax Payments

Prepayments of tax that you sent in during the year, usually by check along with a voucher (e.g., Form 1040-ES for federal estimated tax payments). Do not enter taxes withheld here.

TAXPAYER

FEDERAL PAYMENTS:

QTR	Due Date	Date paid if later than due date	Amount
1	04/15/24		$
2	06/15/24		$
3	09/16/24		$
4	01/15/25		$

STATE:

QTR	Due Date	Date paid if later than due date	Amount
1	04/15/24		$
2	06/15/24		$
3	09/16/24		$
4	01/15/25		$

Locality:

QTR	Due Date	Date paid if later than due date	Amount
1	04/15/24		$
2	06/15/24		$
3	09/16/24		$
4	01/15/25		$

SPOUSE

FEDERAL PAYMENTS:

QTR	Due Date	Date paid if later than due date	Amount
1	04/15/24		$
2	06/15/24		$
3	09/16/24		$
4	01/15/25		$

STATE:

QTR	Due Date	Date paid if later than due date	Amount
1	04/15/24		$
2	06/15/24		$
3	09/16/24		$
4	01/15/25		$

Locality:

QTR	Due Date	Date paid if later than due date	Amount
1	04/15/24		$
2	06/15/24		$
3	09/16/24		$
4	01/15/25		$

Special Situations

If any of these apply, please indicate which ones and provide additional information:

- ☐ You received a notice in 2024 of a tax adjustment or audit, or settled an audit.
- ☐ You gave a gift of more than $18,000 to any one donee during 2024 (in this case, you may need to complete a gift return).
- ☐ You paid or received alimony.
- ☐ You had income not otherwise indicated on the questionnaire
- ☐ You installed property run by solar or geothermal in your home.
- ☐ You employed a nanny or other household employee during 2024 to whom you paid more than $1,600
- ☐ You contribute to Ohio's 529 College Savings Program
- ☐ You had Gambling and/or lottery winnings in 2024
- ☐ You had farm-related expenses (please provide receipts, your records, and any other documents)

If you have other situations or questions, list them here, call, or send an email:

Note: To start a new line, press ALT-ENTER.

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PLEASE SAVE THIS QUESTIONNAIRE, THEN SEND IT AS AN E-MAIL ATTACHMENT OR UPLOAD TO OUR PORTAL

Thank you for completing the questionnaire. Please upload your tax documents to your secure client portal (if you need set up with a secure portal please email beth@davisnagycpa.com) or mail the infomation to our office. Paper items received by other means will be scanned and then returned to you with your completed return. If you're a new client, we also need a copy of your 2022 and 2023 tax returns, if filed. Please do not send expense receipts; only provide the totals for each type of expense which you should have already entered on the questionnaire.

Reminder: Your tax return cannot be filed without your signature.

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