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*****REQUIRED INFORMATION FOR 2024*****

Even if you choose not to complete the organizer, **at the minimum**, please be certain to return to me the following information:

- The engagement letter with your signature of acceptance.
- The completed five-page questionnaire portion of the organizer which is attached. (ORG3, ORG3, ORG3A, ORG4, & ORG6). Please answer each of the questions to assist me with your tax returns.
- Copy of driver license(s).
- Copy of Social Security Cards for all NEW dependents.
- Please answer additional questions below which are required for the completion of your tax returns.
- Please fill out the Consumer Use Tax Worksheet information below for state tax return requirements.
- **Please confirm/correct/add the data below:**

Name: _____

Address: _____

City, State, Zip: _____

Phone Number: _____

Email: _____

I CANNOT BEGIN YOUR RETURN UNTIL THIS IS COMPLETED.

Additional Questions:

Virtual Currency Question:

Did you buy, own, or sell any virtual / crypto currencies in 2024? Yes No
If yes, please provide supporting information.

Required Minimum Distribution (RMD):

Did you take your "Required Minimum Distribution"? Yes No N/A
If yes, did you transfer it to a 501c3 charitable organization? Yes No N/A
If yes, please provide supporting information.

Are you a U.S. Veteran? Taxpayer: Yes No
Spouse: Yes No

Consumer Use Tax

Please fill out A, B, or C. if you **are** a NC resident. Please complete part D ONLY if you are **not** a NC resident.

A: I have records of all out-of-state purchases and no sales tax was charged on the following purchases:

Total purchases from 1/1/24-12/31/24 \$ _____

B: I do not have records of my purchases, but I had less than \$1,000 in out-of-state purchases in which no sales tax was collected. Please use the Use Tax Table.

C: I had no out-of-state purchases, or I did not have any out-of-state purchases in which sales tax was not collected.

- D: I am not a NC resident.
 - I did have out-of-state purchases in which sales tax was not charged.
 - Total purchases from 1/1/24-12/31/24 \$ _____
 - I did not have out-of-state purchases in which sales tax was not collected.