



**BUSINESS AND RENTAL QUESTIONS**

*(skip this section if not applicable, or if business is a Partnership or Corporation)*

**YES NO**

- | <input type="checkbox"/> | <input type="checkbox"/> | 1. Did you start a new business or purchase any rental property during 2024?   |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 2. Did you purchase (or begin using) any assets for your business costing more than \$2,500?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 3. Did you sell (or stop using) any assets for your business?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 4. Did you make any business payments that require you to issue 1099s? (\$600 threshold; not needed for rentals)   |
| <input type="checkbox"/> | <input type="checkbox"/> | 5. If yes, have you filed all 1099s?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 6. Do you have all the documentation to support all business expenses? <i>(If yes, please attach Schedule C)</i>   |
| <input type="checkbox"/> | <input type="checkbox"/> | 7. Do you have all the documentation to support all rental expenses? <i>(If yes, please attach Schedule E)</i>   |
| <input type="checkbox"/> | <input type="checkbox"/> | 8. Did you spend 250 or more hours of rental service activity? <i>(If yes, please attach log)</i>  |
| <input type="checkbox"/> | <input type="checkbox"/> | 9. Do you have a log for business mileage? <i>(If yes, please attach log)</i>  |
| <input type="checkbox"/> | <input type="checkbox"/> | 10. FinCen Requirements: Did your LLC Members or Business have a change in address or Members?<br><i>If yes, it is recommended to update with FinCen</i> |

1. ***If you are due a refund, would you like it direct deposited into your bank account?***
2. ***If you have a balance due, would you like it electronically withdrawn from your bank account?***

Bank Name: \_\_\_\_\_  
 Routing Number: \_\_\_\_\_  
 Account Number: \_\_\_\_\_

*Is this a savings account?*     Yes     No

**CHECK YOUR PREFERRED METHOD FOR SIGNING YOUR TAX RETURN**

**CHECK YOUR PREFERRED METHOD FOR TAX RETURN DELIVERY**

- Sign Electronically
- Sign in the Janesville Office
- Sign in the Evansville Office

- Mail
- Portal Upload
- Paper Copy at Janesville Office
- Paper Copy at Evansville Office

***If signing electronically, please provide your e-mail address(es).***

**TAXPAYER E-MAIL:** \_\_\_\_\_  
**SPOUSE E-MAIL:** \_\_\_\_\_

**DRIVER'S LICENSE INFORMATION**

**TAXPAYER:**    DOB: \_\_\_\_\_    LICENSE #: \_\_\_\_\_  
                   STATE: \_\_\_\_\_    ISSUE DATE: \_\_\_\_\_    EXP. DATE: \_\_\_\_\_

**SPOUSE:**    DOB: \_\_\_\_\_    LICENSE #: \_\_\_\_\_  
                   STATE: \_\_\_\_\_    ISSUE DATE: \_\_\_\_\_    EXP. DATE: \_\_\_\_\_

*By signing below, I certify all information provided on and in connection with this form is true and correct to the best of my knowledge. If any information provided is incomplete, inaccurate, misleading, or false, I may be subject to tax filing delays, tax audits, or legal action.*

**TAXPAYER SIGNATURE:** \_\_\_\_\_    **DATE:** \_\_\_\_\_  
**SPOUSE SIGNATURE:** \_\_\_\_\_    **DATE:** \_\_\_\_\_

## EXAMPLES OF SUPPORTING DOCUMENTS TO INCLUDE

YES	N/A	<u>INCOME</u>
<input type="checkbox"/>	<input type="checkbox"/>	Salaries and Wages ( <i>Form W-2 and final paystub</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Gambling Income ( <i>Form W-2G</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Retirement Plan Distributions ( <i>Form 1099-R</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Social Security Income ( <i>Form SSA-1099</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Railroad Retirement Income ( <i>Form RRB-1099-R</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Interest Income ( <i>Form 1099-INT</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Dividend Income ( <i>Form 1099-DIV</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Sales of Stocks and Bonds, Bartering, and Stock Options ( <i>Form 1099-B, 3921, 3922 or Brokerage Statement</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Unemployment Income ( <i>Form 1099-G</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Other Income ( <i>Form 1099-MISC</i> )
<input type="checkbox"/>	<input type="checkbox"/>	529 Tuition Plan Distributions ( <i>Form 1099-Q</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Health Savings Account Distributions ( <i>Form 1099-SA</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Proof of residency for children under seventeen that qualify for Child Tax Credit or Form 8332
<input type="checkbox"/>	<input type="checkbox"/>	Income from Estates, Trusts, Partnerships, or 'S' Corporations ( <i>Schedule K-1</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Detailed Mileage Log or print out
<input type="checkbox"/>	<input type="checkbox"/>	Other Sources of Income, <i>i.e. Alimony received, jury duty pay, prizes &amp; awards, etc. (Please list):</i>

YES	N/A	<u>DEDUCTIONS &amp; CREDITS</u>
<input type="checkbox"/>	<input type="checkbox"/>	Student Loan Interest Paid ( <i>Form 1098-E</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Alimony Paid
<input type="checkbox"/>	<input type="checkbox"/>	Contributions to a Traditional IRA
<input type="checkbox"/>	<input type="checkbox"/>	Contributions to a Health Savings Account ( <i>HSA</i> )
<input type="checkbox"/>	<input type="checkbox"/>	College Tuition paid for you or your dependents ( <i>Form 1098-T</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Childcare Expenses for children under the age of thirteen ( <i>provide facility name &amp; EIN</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Other Deductions and Credits ( <i>please list</i> ):

YES	N/A	<u>ITEMIZED DEDUCTIONS</u>
<input type="checkbox"/>	<input type="checkbox"/>	Medical, Dental, and Vision expenses, prescriptions, and health and long-term insurance premiums
<input type="checkbox"/>	<input type="checkbox"/>	Miles driven and lodging for seeking medical care
<input type="checkbox"/>	<input type="checkbox"/>	Property and other State or Local Taxes
<input type="checkbox"/>	<input type="checkbox"/>	Mortgage Interest and Mortgage Insurance Premiums ( <i>Form 1098</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Donations to charity ( <i>cash and non-cash</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Casualty or theft losses
<input type="checkbox"/>	<input type="checkbox"/>	Gambling Losses (to the extent of winnings)
<input type="checkbox"/>	<input type="checkbox"/>	Other Itemized Deductions ( <i>please list</i> ):

YES	N/A	<u>WISCONSIN DEDUCTIONS</u>
<input type="checkbox"/>	<input type="checkbox"/>	Property Taxes or Rents paid for a Wisconsin residence
<input type="checkbox"/>	<input type="checkbox"/>	Contributions made for Private School Tuition ( <i>Grades K-12</i> )
<input type="checkbox"/>	<input type="checkbox"/>	Contributions made to an EdVest college savings plan.
<input type="checkbox"/>	<input type="checkbox"/>	Health Insurance Premiums Paid, <i>excluding any amounts paid under a 'flexible spending' or cafeteria-type plan</i>
<input type="checkbox"/>	<input type="checkbox"/>	Other Wisconsin Deductions ( <i>please list</i> ):

YES	N/A	
<input type="checkbox"/>	<input type="checkbox"/>	Other State Deductions ( <i>please list</i> ):