CLIENT PROFILE

Client Name and General Info	**C1:** First Name: **C2:** First Name:	**C1:** MI: **C2:** MI:	**C1:** Last Name: **C2:** Last Name:		
	C1: Birth Date: C2: Birth Date:			**C1:** SSN: **C2:** SSN:	
Address	Street			Suite/Apt	
	City			State	Zip
Contact Info	Home	**C1:** Cell: **C2:** Cell:		**C1:** Email: **C2:** Email:	
Current Employment	**C1:** Taxpayer Employer: **C2:** Taxpayer Employer:			**C1:** Work Phone: **C2:** Work Phone:	

Dependent Information (Only input if your child falls under the IRS's definition of "qualifying dependent")

First Name	MI	Last Name	SSN	Birth Date	Relationship

<u>Please Circle *YES* or *NO*</u>

Did you receive any Schedule K-1 forms for shares in a Partnership, Limited Liability Company or Subchapter S Corporation? — **C1:** YES/ NO **C2:** YES/NO

If yes, please bring copies of all of your Schedule K-1 forms.

Do you own any annuities? — **C1:** YES/ NO **C2:** YES/NO

C1: If yes, did you make any withdraws? Yes (amount): ________ No: ___
C2: If yes, did you make any withdraws? Yes (amount): ________ No: ___

Do you own a <u>Traditional</u> *(not Roth)* IRA or 401K? — **C1:** YES/ NO **C2:** YES/NO

- ➔ C1: If yes, did you contribute to it? Yes (amount):___________ No: ____
- ➔ C2: If yes, did you contribute to it? Yes (amount):___________ No: ____

Did you contribute to your spouse's IRA this year? — **C1:** YES/ NO **C2:** YES/NO

- ➔ C1: If yes, what amount: ____________
- ➔ C2: If yes, what amount: ____________

Did you take a withdrawal or distribution before age 59 ½ from a pension plan or IRA? ***(Only answer if you're 61 and under)*** — **C1:** YES/ NO **C2:** YES/NO

- ➔ C1: If yes, what was the amount: $ _______________
- ➔ C2: If yes, what was the amount: $ _______________

Did you have any qualifying charitable donations (QCD), meaning you donated money <u>directly</u> from your Traditional IRA? — **C1:** YES/ NO **C2:** YES/NO

- ➔ If yes, fill in below:

Charity: ________________ Charity: _________________
Amount: ___________ Amount: __________

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Please return this form with all your information
when you come for your initial tax preparation appointment.

Please remember to bring all of your W-2 forms, 1099 Interest (including accounts with Wood Financial Group), Dividend or Pension forms, and your Social Security Statements if you receive social security payments.

If you are filing **jointly**, have your spouse use **C2 section** for the following questions.

Please Circle *YES* or *NO*

Do you have investments with any firm outside of Wood Financial Group? **C1:** YES/ NO **C2:** YES/NO

Did Wood Financial Group prepare your taxes last year? **C1:** YES/ NO **C2:** YES/NO
- ➔ *If no, you **must** bring your last two years' tax returns*
- ➔ *If yes, no need to bring previous year's tax returns*

Did you work in another state this year? **C1:** YES/ NO **C2:** YES/NO
- ➔ If yes, State: ________

Did you live in another state, for more than 6 months, in 2024? **C1:** YES/ NO **C2:** YES/NO
- ➔ If yes, State: ________

Did you itemize deductions last year on Schedule A? **C1:** YES/ NO **C2:** YES/NO
If yes, request a Schedule A-Itemized Deductions Worksheet from our office if you did not already receive one in this packet

Did you sell or redeem any securities in 2024 outside of a retirement Account? *Schedule D-Capital Gains & Losses **C1:** YES/ NO **C2:** YES/NO
- ➔ *If yes, please provide a 1099-B (record of each sale/redemption & amount you originally paid for a security). Your broker should be able to provide a print-out of this information. We will not be able to complete your tax return w/o this information.*
- ➔ *If you are a Wood Financial Group Client, know you must bring your 1099-Bs.*

Did you receive, sell, exchange, or dispose of any financial interest in any virtual (crypto) currency? **C1:** YES/ NO **C2:** YES/NO

Do you have any rental property? **C1:** YES/ NO **C2:** YES/NO
- ➔ *If yes, request a Schedule E-Rental Property Worksheet from our office if you did not already receive one in this packet*

Do you own a business or are you self-employed? **C1:** YES/ NO **C2:** YES/NO
If yes, request a Schedule C Worksheet from our office if you did not receive one in this packet

Did you make estimated tax payments? **C1:** YES/ NO **C2:** YES/NO
- ➔ *If yes, complete the chart below:*

Record of Estimated Tax Payments			
Payment #	Payment Date	Check #	Amount Paid
1			
2			
3			
4			
TOTAL			

*****Please bring a new voided check to your Tax Drop-off Appointment* ****