

## 2025 TAX APPOINTMENT & QUESTIONNAIRE (for 2024 Taxes)

Dear client,

Your tax appointment for this year is:

Day \_\_\_\_\_ Date \_\_\_\_\_ Time \_\_\_\_\_ am/pm

This document digitally available at  
mckaytax.com (tools & checklists)



My Office \_\_\_\_\_ Mail \_\_\_\_\_ Portal \_\_\_\_\_ Drop Off \_\_\_\_\_

If you are unable to keep this appointment date kindly give us as much advance notice as possible so that your time can be filled by someone else.

### OPTIONS FOR SHARING YOUR TAX INFORMATION WITH US IN ORDER TO COMPLETE YOUR TAX RETURN

- Use our secure portal to upload your fillable questionnaire and tax documents to complete your taxes remotely. \$10 discount with completed questionnaire. Please contact us before your appointment date if you choose this option.
- Mail your information to me and I can complete your taxes and mail back to you
- After arriving at your scheduled appointment time call us and we will immediately secure your information and complete your taxes in our office with phone call(s) while you wait in your vehicle.
- Meet with us for your appointment if in our office.

### HOW TO ENSURE THAT YOU ARE GETTING THE MAXIMUM POSSIBLE DEDUCTIONS & CREDITS ALLOWED BY LAW:

- Please read and complete the "Information Checklist" (right) and all other parts of the questionnaire that apply before the appointment date.
- Bring a list of all other tax questions to the appointment.

### TO OPT OUT OF RECEIVING TEXT MESSAGES PLEASE CONTACT US TAX PREPARATION FEES:

- Minimum fees including state are \$110 or \$100 if filing through the portal (only with a completed questionnaire). Dependents prep fees are minimum \$40. The average fee is usually between \$130 and \$160 but can vary by the number of extra forms and their complexity. See the complete list of form prices at Mckaytax.com
- You may pay with cash, check, Visa, Master Card or Venmo

If you have any questions or need to change your appointment, please call (801) 731-1857. If I am not in the office then please leave a message and I will return your call promptly. Thanks for your business.

Richard V McKay E.A  
Rebecka P McKay



McKay Tax and Accounting  
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[www.Mckaytax.com](http://www.Mckaytax.com)  
RV Software Inc.

## Please have the following available for our appointment;

- Last years tax return (Only if done by someone else)
- All W-2's, 1099's, k-1's, 1098's
- Records of all other incomes and expenses
- Escrow statements of any property bought, sold or financed
- Health Insurance Form 1095-A if applicable
- State ID (Drivers License)

YES	NO	Unsure	INFORMATION CHECKLIST		
			Did you have any other sources of income other than from the W2s, 1099s, K1s, and other income information that you have presented ?		
			At any time during 2024, did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual		
			Has your marital status, address, or dependents changed last year?		
			Did you support anyone other than your own children or does anyone live with you who is not your dependent?		
			Do you have any losses to carry forward from previous years?		
			Did you sell any securities or has any become worthless during 2024?		
			Did you pay interest on a mobile home, motor home, or boat that has basic living accommodations?		
			Did you buy, sell, or refinance real estate? Bring Hud statements.		
			Did you pay for medical insurance that is not subsidized by an employer?		
			Do you use a portion of your home as an office for business purposes on an ongoing and exclusive basis (Only if you have a small business)?		
			Do you anticipate any substantial changes in income, deductions, or tax withholding for the coming year?		
			Did you pay higher education expenses for you or your dependent this year? (Tuition, Fees, Books, and interest). List names and amounts on page two, section 6 under "Education Credits". <b>Bring form 1098-T</b>		
			Does anyone owe you money which has become a bad debt? (There must be true debtor/creditor relationship)		
			Last year did you or your spouse purchase health insurance from the Marketplace (Obamacare) to help you reduce your monthly health insurance costs? ( <b>Form 1095-A</b> )		
			Did you make energy efficient improvements to your home or purchased an Electric Auto?		
			Did you receive alimony?	Amount	
			Did you pay alimony	SS #	Amount
			If you contribute to a retirement plan that was not a deduction from your wages then enter below. Information for retirement plans deducted from your wages are accounted for in your W2		
			Did you contribute to a regular IRA ?	Amount	
			Did you contribute to a Roth IRA ?	Amount	
			Do you have a health savings account? Bring Form 1099-SA		
			In 2023 did you have interest in a foreign account ?		
			Do you use a home equity loan to buy or improve your home? If so please provide principal balances during the year.		

## INCOME 2024

### Section 1: PERSONAL INFORMATION

CHECK IF NO PERSONAL CHANGES FROM LAST YR & WE DID YOUR TAXES

If there are no changes it is not necessary to fill in personal data section EXCEPT DEPENDENTS INCOME & AGE.

Full Names(both)				
Address				
Home Phone		Work Phone		email
	Soc. Sec. Number	Occupation	Cell Phone	Date of Birth
You				
Spouse				

### Section 2: DRIVERS LICENSE

	License num	State	Issue date	Expiration Date
You				
Spouse				

### Section 3: DEPENDENTS

PLEASE LIST ALL BIRTH DATES & INCOME

Full Name	Relation-Ship	Date of Birth	Income	Social Security Number	Months lived in home 2024

**TOTAL HOUSEHOLD RESIDENTS IN 2024**

### Section 4: ALL INTEREST AND DIVIDENDS RECEIVED

Interest Source	Amount	Dividend Source	QU	Amount

### Section 5: SALE OF STOCKS / SECURITIES

Description	Date Acquired	Date Sold	Cost/ Basis	Selling Price

### Section 6: OTHER INCOME

State tax refunds received in 2023	Tips received-(unreported only)	
Unemployment compensation - bring statements	Hobby income	
Social Security/RR Tier 1 - bring statements	Other income(prize,award,gambling) bring info	

## DEDUCTIONS 2024

### Section 7: MEDICAL EXPENSES

Prescription drugs				
Health insurance premiums /Medicare				
Doctors/Dentists				
Hospitals / Emergency Care/X-ray/Lab				
Medical equipment				
Glasses / Contacts /Hearing Aids				
Medical Miles (22¢)				
Reimbursements for amounts above				
				Cafeteria Plan Payments

### Section 8: TAXES (Utah car fees not deductible)

State Tax Paid with 2023 taxes in 2024	Real Estate Residence
Sales Tax on Auto,Truck, Boat, Motorcycle	Real Estate Tax Land
Auto/Truck county tax (NOT valid in Utah)	Other Real Estate

### Section 9: INTEREST PAID

Mortgage Interest (1st, or 2nd to improve HM)		Investment Int	
Mortgage Interest (1st, or 2nd to improve HM)		<b>Note: Interest only for buying or improving home</b>	
Mortgage Insurance (1st/2nd to improve HM)			

### Section 10: CONTRIBUTIONS

Donee	Amount:	Donee	Amount
Donee	Amount:	Donee	Amount
Donee	Amount:	Donee	Amount
Charitable Miles (14¢)			
Donated Property Description			
Cost			
Fair Market Value			

### Section 11: EDUCATION CREDITS (must have form 1098-T)

Student Name	College year fresh,soph,Jr,Sr	Tuition/ Fees/ books	Loan Interest

### Section 12: CHILD CARE EXPENSES

Child/Dependent Care Expenses(under 13) or Physically Handicapped

Care Provider	Address	S.S.#/E.I.#	Amt. Paid

Employer Provided Child Care Payments (Cafeteria Plan)

### Section 13: ESTIMATED TAXES PAID

1st Quarter Date		1st Quarter Amount	
2nd Quarter Date		2nd Quarter Amount	
3rd Quarter Date		3rd Quarter Amount	
4th Quarter Date		4th Quarter Amount	

**BUSINESS INCOME and EXPENSES 2024**

**Section 14: SELF EMPLOYED INCOME/EXPENSES**

Product or Service			
Did you actively participate in the business this year	YES		NO
Did you file a Schedule C for this business before	YES		NO
Gross Income	Returns		
Beginning Inventory		Purchases	
Personal Use Items		Ending Inventory	
Advertising		Rent(other)	
Bad Debts		Repairs/Maint.	
Bank Charges		Supplies	
Commissions/fees		Taxes/License	
Cleaning		Travel	
Depletion		Meals	
Dues/Publications		Medical Ins.	
Employee Benefits		Utilities	
Insurance		Wages	
Business Interest		Job Credit	
Interest(mortgage)		Other:	
Legal/Professional		Other:	
Profit Sharing		Other:	
Rent(equip/veh)		Other:	

**Section 17: RENTAL INCOME/EXPENSES**

Property	Address		
A			
B			
C			
Did you or a member of your family use any of these properties for personal purposes for the greater of fourteen(14) days or 10% of the total days rented at a fair rental value?		YES	NO
Did you actively participate in the operation of these activities this yr.		YES	NO
Properties	A	B	C
Income			
Advertising			
Auto/travel			
Cleaning/Maintenance			
Commissions			
Insurance			
Legal/Professional			
Mortgage Interest			
Other Interest			
Repairs			
Supplies			
Taxes			
Electricity			
Heat			
Water/Garbage			
Phone			
Yard Care			
Other:			

*Income from Partnerships/S Corp/Estates/Trusts: Attach K-1's*

**Section 18: TRANSACTIONS NOT REPORTED ON FORM 1099**

Description	Date Acquired	Date Sold	Receipts	Cost

**Section 19: SECURITIES AND PROPERTY SOLD**

Description	Date Acquired	Date Sold	Receipts	Cost

**Section 20: ASSETS PURCHASED for BUSINESS/RENTAL**

Description(and which business)	Date Purchased	Cost

**Section 15: VEHICLE EXPENSES-EMPLOYEE or SELF EMPLOYED**

	Veh 1 Desc:		Veh 2 Desc:	
Date placed in service				
Total mileage for year				
Business miles for year				
Distance from home to work				
Cost/Fair Market Value on date place in service				
Do you have another personal vehicle(Y/N)	YES		NO	
Do you have written evidence of business miles(Y/N)	YES		NO	

**Section 16: VEHICLE ACTUAL EXPENSES (Not required for mileage rate)**

	Vehicle 1 Desc:		Vehicle 2 Desc:	
Gas/Oil/Repairs/Wash				
Tires/Batteries etc..				
Insurance/License				
Taxes				
Interest				
Lease Payments				
Other:				

**Section 18: OFFICE IN THE HOME SELF EMPLOYED**

Office Square Ft		Home Square Ft	
Home Interest		Home taxes	Heating
Electricity		Insurance	Rent
Office Repairs		Office Maint.	Other