

If Rainbow Accounting Services, LLC is unable to contact me after multiple attempts through phone, email, or US mail, they have permission to contact the following individual in an attempt to reach me. ****Please note, this will not be used except in the most dire of circumstances.**

Contact's Information (**DO NOT list your spouse**):

Name: _____ Relationship _____
Phone: _____

Name: _____ Relationship _____
Phone: _____

As part of our mission in serving our clients, we encourage and want you to have a solid financial foundation for yourself and your family. By providing financial education in many areas of personal finance, we can help you achieve these personal financial goals. This is a part of our service and there is no additional cost to you. We are able to help you plan for life changes such as marriage, children, buying your first home, funding your child's education and planning for your retirement.

The section below is not required but is helpful to us when working with your information.

	<u>Taxpayer</u>	<u>Spouse</u>	<u>I would like More Information</u>
Life Insurance			
Durable Power of Attorney			
Medical Power of Attorney			
Living Will			
Regular Will			
Retirement Accounts			
Living Trust			
Stocks			
Individual Retirement Accounts (IRA):			
Roth IRA			
Traditional IRA			
Bonds			
Family Attorney			

By signing the bottom of this questionnaire, you are verifying that you have provided Rainbow Accounting staff truthful and accurate information and that you have included ALL income from ALL sources for 2023.

I/We have reviewed this information and the answers and all handwritten information on this checklist is correct to the best of my/our knowledge.

Signed: _____ Date: _____
Taxpayer

Signed: _____ Date: _____
Spouse

Questions - All Taxpayers

(Provide related statements or other documentation)

"You" refers to both taxpayer and spouse - Put a "?" if unsure about a question.

LIFESTYLE & TAXES	Are you: Single Married Divorced Separated Widowed		
	Did your marital status change since last year? If yes, date:		
	Did you pay or receive alimony in 2024?	Recipient's SSN	Date of divorce or separation
	Paid Received \$		
	Are either you or your spouse legally blind?		
	Did you have health insurance for you, your spouse, and all dependents for the entire year?		
	Did you purchase health insurance through a public exchange? I.E. The Marketplace?		
	Will there be any significant changes in income or deductions next year, such as retirement?		
	Did you pay anyone for domestic services in your home?		
	Did you purchase a new energy-efficient car, truck, or van?		
	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?		
	Are you a member of the military? Active / Retired / National Guard		
	Were you a citizen of or lived in a foreign country?		
	Do you own or have financial interest in a foreign bank or financial account?		
	Do you have Educator Expenses for Supplies? Dollar Amount _____		
Did you make any deductible contributions? Cash or Otherwise?			
CHILDREN & EDUCATIO	Do you have any dependents? (If yes, please see separate Child Questionnaire.)		
	Did you or any dependents attend college? (If yes, please see college questionnaire.)		
	Did you make any contributions to a 529 plan in 2024?		
	Child:	Amount:	
	Child:	Amount:	
INVESTMENTS	Do you have any old retirement accounts from previous employer/s that you have not privatized?		
	Did you, or will you, contribute any money to an IRA for 2024?		
	Traditional IRA amount: Taxpayer:		Spouse:
	Roth IRA amount: Taxpayer:		Spouse:
	Did you roll over any amounts from a retirement account in 2024?		
	Did you sell or transfer any stock?		
	Did you sell any rental or investment property?		
	Did you receive any income from an installment sale?		
	Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?		
Were you granted, or did you exercise, any employee stock options in 2024?			
DEDUCTIONS	Did you have any investments that became worthless or were a victim of investment theft in 2024?		
	Did you pay any interest on a loan for a boat or RV that has living quarters?		
	If yes, provide details:		
	Did you pay sales tax on a major purchase in 2024, such as a vehicle, boat, or home?		
Did you make charitable contributions in 2024?			
BUSINESS	Did you work from a home office or use your car for business?		
	Did you receive income from a sharing/gig economy activity? (e.g. Airbnb, Uber, Door dash, ect.)		
	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?		
HOME	Did you purchase or sell a main home during the year? If yes, provide closing statement.		
	Did you refinance a mortgage or take a home equity loan? (Provide closing statement)		
	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?		
	Did you purchase and install any new energy-efficient items for your home? If yes, provide details.		
States of residence during 2024 and dates:			
School District:			