B. Johnson & Assoc., Ltd.
CERTIFIED PUBLIC ACCOUNTANTS

416 S 6th St, Ste 200
Brainerd, MN 56401

Phone - (218) 829-3501

Individual Income Tax Questionnaire

Credits: see page 4 for required documentation

I (We) assure you that the information provided in this form, along with any other information sheets provided for preparation of my (our) income tax returns is correct to the best of my (our) knowledge and belief. I (We) understand that payment for your services is due upon receipt of my (our) tax returns.

______________________ Signature ______________________ Signature __________ Date

	Taxpayer(s)	Social Security #	Occupation	Date of Birth
Name(s)		- -		
		- -		
Address				
	Street	City	State	Zip

If you have any refunds and you would like them to be direct deposited to your account, please provide :

________ Voided check (for checking account)
________ Deposit Slip (for savings account)
________ **Same as your 2023 tax return**

Home Phone ____________________
Work Phone ____________________
Cell Phone ____________________
Fax ____________________
E-Mail ____________________
E-Mail ____________________

Did you or do you plan to make IRA contributions for this year? Yes____No____

Contributor	Type of Account (Traditional, Roth, Educ.)	Dates	Amounts

Did you have an interest in or a signature authority over a financial account in a foreign country? Yes____No____
If Yes : Name of country____________
Did you pay $2,700 or more to any one household employee this year? Yes____No____
Do you want to designate $3 to the federal presidential election campaign fund? Yes____No____ Yes____No____
Do you want to designate $5 to the state elections campaign fund? Yes____No____ Yes____No____
Your choice(s) of political party? ____________ ____________

Did you have a theft or casualty loss over 10% of your gross income after insurance proceeds? Yes____No____
If yes, please explain : ______________________________
Did you make gifts of more than $18,000 to any one individual during the year? Yes____No____
If yes, please explain : ______________________________
Did you receive correspondence from the State or the IRS during the year? Yes____No____
If yes, please explain : ______________________________

If you want to donate to the Minnesota Nongame Wildlife fund, fill in the amount
Income Tax Return $________
Property Tax Return $________

Do you foresee any significant changes to your financial situation that will affect your tax liability for 2025? If so, please explain briefly : ______________________________

Property Tax Refund: If you want us to prepare your Minnesota renter or homeowner property tax refund return Form M-1PR, you need to provide us with your 2024 Certificate of Rent Paid or your 2025 Statement of Property Taxes Due. There is an additional fee for this service.

We will notify you by mail when your tax returns are completed. Please let us know if your mailing address is different from the address above. ______________________________

Wage and Salary Income

(Attach All W-2's Received)

Employer	Gross Wages (Box 1)	Federal Tax	State Tax

Retirement Income

(Attach All 1099's Received)

Payor	Gross Distribution	Taxable Distribution	Federal Tax	State Tax
Social Security ………………………………………………………				
Social Security ………………………………………………………				
Railroad Retirement ………………………………………………				
IRA's………………………………………………………………………..				
Pensions……………………………………………………………….				

Interest Income

(Attach All 1099's Received Including All Tax-Exempt Interest Received)

(If Interest is Received on a Contract For Deed, The Payor's Name, Address and Social Security # are Required)

Payor	Amount	Payor	Amount

Dividend Income

(Attach All 1099's Received Including All Tax-Exempt Dividends)

Payor	Dividends	Qualified Dividends	Capital Gains	Tax Exempt	Foreign Tax

Miscellaneous Income

(Attach Relevant Forms)

Unemployment Compensation…………..		Estates or Trusts…………………………………	
Alimony………………………………………		Royalties……………………………………….......	
VA Pension………………………………………		Welfare Assistance…………………………………	
VA Disability……………………………………		Partnership or S-Corp (Provide K-1)………….	
Tips and Gratuities………………………..		Lawsuit Recoveries……………………………….	
Directors Fees………………………………		Cancellation of Debt………………………………	
Prizes and Awards…………………………		Other (Describe) :	
Workers' Compensation……………………			

Security and Real Estate Sales

(Foreclosures, Abandonments, Ponzi Scheme Losses and Other Property Transactions Need to be Listed Here)

Description	Date Acquired	Date Sold	Sales Price	Cost	Expenses

Medical and Dental Expenses

Medical Insurance……………..……..………… ______
Medicare Insurance……………..…………..…. ______
Long Term Care Insurance……..…Taxpayer ______
Spouse ______
Name of Company ______
Policy # (s): ______
Prescription Drugs………...…..…..…………. ______
Glasses and Contacts………..……......…… ______
Hearing Aids……………………...………..….... ______
Doctors, Dentists, Hospitals and Clinics : ______

HSA Contributions……………………………. ______

Ambulance……………………………..… ______
Medical Transportation:
Mileage ______miles @ $ .21 ______
Parking, Bus, Taxi……………………..….. ______
Motels…………………………………..…… ______
Other Expenses (Describe) : ______
Less HSA Reimbursements included above……………..……….....…… ( )
Less Insurance Reimbursements included above……………..……….....…… ( )

Interest Paid

	Financial Institution	Amount Paid
Deductible Home Mortgage:		
Interest Paid to Banks and Other Financial Institutions :		
List All Mortgages and Equity Loans		
(Attach All 1098 Forms Received)		
Deductible Mortgage Insurance:		
(Only Applies to New Mortgages)		
Points Paid on Purchase or Refinance of Mortgage Loans :		
(Include Copy of Settlement Statement)		

Interest Paid to Individuals on a Contract For Deed : (Payee's Name, Address and Social Security # must be included; failure to provide is subject to a fine)
Name………………………………….……….……… ______
Address………………………………...….……….... ______
Social Security #.....…………….………...….……..….. ______

Investment Interest :

Investment Loan Relates to :	Interest Paid to	Amount Paid
Brokerage Margin Account:		
Other (Describe)		

Student Loan Interest :
Student's Name…………………………....………..……… ______
Interest Paid (Attach 1098-E Forms)……………...……….. ______

Contributions

Only amounts given to qualified charitable organizations qualify. Examples of NON-DEDUCTIBLE amounts are to political organizations and candidates, dues and fees paid to lodges and fraternal orders, raffles, bingo, and pull tabs.
Please list all of your qualified charitable gifts here as you may receive a deduction even if you do not itemize deductions.

Cash Contributions :

Religious Organizations..…………………….. ______
Schools…………….…….…..……………….. ______
United Way……………………….…..………. ______
Boy Scouts / Girl Scouts……..………..……. ______
Other (Please list) : ______

Volunteer Mileage : ______miles @$ .14 ______

Non-Cash Contributions:

1) Complete the worksheet included with your organizer.
2) You must have a receipt stating the amount received by the organization from the sale of a donated vehicle, boat, etc.

If TOTAL Non-Cash Contributions are:
Less than $250: Receipt not required if impractical.
Document donations with written description.

More than $250: Receipts required.

The IRS requires proof for ALL cash contributions to qualified charitable organizations.
(receipt, cancelled check, bank statement, credit card statement, etc.)

Taxes Paid

Auto Licenses : List separately

(Describe) : ______________________ ______
______________________ ______
______________________ ______

Sales Tax - on these major purchases: vehicle, boat, home building materials, etc.

______________________ ______
______________________ ______

Real Estate Taxes :

Home……………………………	______
M-1PR Refund Received……	( )
Second Home/Cabin…………	______
Land………………………………	______
______________________	______
______________________	______
______________________	______

Income Taxes :

	Date Paid	Federal	State
Prior Years Refunds Received………………………………………………………		______	______
Prior Years Additional Payments………………………………………………………	______	______	______
Estimated Tax Payments:			
Prior Year 4th Installment Due January 15, 2024……………………………………	______	______	______
1st Installment Due April 15, 2024………………………………………………	______	______	______
2nd Installment Due June 15, 2024………………………………………………	______	______	______
3rd Installment Due September 15, 2024………………………………………………	______	______	______
4th Installment Due January 15, 2025………………………………………………	______	______	______

Other Deductions

Alimony Paid…………………………………	______
Name and Social Security # of Recipient	
______________________	
Work or Job Related Expenses :	
Union and Professional Dues……….	______
Work Supplies………………………….	______
Tools and Safety Equipment………….	______
Required Uniforms and Laundry………	______
Trade Journals and Subscriptions…….	______
Your Continuing Education :	
(Enter information for your dependents education on the dependent questionnaire)	
Tuition and Fees……………………….	______
Books and Supplies…………………….	______
Travel or Miles @ $ .67………………...	______
	______

Tax Preparation Fee………………………………….	______
Safe Deposit Box…………………………………….	______
Investment Fees and Expenses…………………….	______
IRA Maintenance Fees…………………………….	______
Adoption Expenses…………………………………..	______
Explain __________________________	
Moving Expenses (military active duty)……………	______
Explain __________________________	
Mileage:	
________ miles @ $ .21	
______________________	
Job Hunting Expenses………………………………………………………	______
Other Items (Describe) :	
______________________	______
______________________	______
______________________	______
______________________	______
______________________	______

If you have expenses for business, work, or farm use of your personal automobile, fill in the required information on the separate information questionnaires.

Please bring the following documents with your information:

W-2 Forms for Wages and Gambling Winnings.
1099 Forms for Interest, Dividends, Stock Transactions, Real Estate Sales, and Miscellaneous Income.
1099 Forms for Pension and IRA Distributions.
1099 Forms for Unemployment Compensation Received.
K-1 Forms for Partnerships, S-Corporations, Estates and Trusts.
1098 Forms for Interest Paid on Mortgages.
1098-E Forms for Interest Paid on Student Loans.
1098-T Forms for Tuition Payments.
1099-C Forms for Cancellation of Debt.
SSA-1099 Forms for Social Security Benefits Received.
RRB-1099 Forms for Railroad Retirement Benefits received.
Real Estate Sales / Purchases Closing Statements.
Contract For Deed - Name, Address, and Social Security # Information.
Refinancing Loan Closing Statements.
Any Tax Notices from the Internal Revenue Service or Minnesota Department of Revenue.

Credits:
Mortgage Interest Credit:
Mortgage Interest Certificate.
Child & Dependent Care Credit:
Qualifying Expenses.
Education Credits:
Forms 1098-T and Cost of Books and Supplies.
Solar, Wind & Geothermal Energy:
Receipts for Qualified Property.
Adoption Credit:
Receipts for Qualified Expenses.
Energy Credits:
Receipts for Energy Efficient Costs.

Payment for tax preparation is expected at the time your returns are filed. All unpaid balances are subject to a 1 1/2% per month (18% annual rate) service charge.