LFM Client Questionnaire



Please answer the following questions. Your return will NOT be started until this is filled out clearly and completely.

1.	Taxpayer Name						
2.	Spouse Name						
3.	Filing Status (please circle one)	Single	Head of House	ehold ^I	Married Filing Separately		ried Filing Jointly
4.	Current Address						_
5.	Current Phone Number(s)						
6.	Current Email Address(es)				(Requested by the	State of V	Wisconsin)
7.	Preferred method of contact	Phone	Email				
8.	How would you like to receive	e your tax return? Circ	cle all that apply.	Pick Up at LFN	1 Mail	E-ma	il PDF
9.	Please list the dependents you	are claiming for 2024.	If new, please include	detailed info	rmation in the bo	xes bel	ow.
	Dependent's Name	Social Security Number	Relationship to You	Date of Birth	Months Lived with You During 2024	Disa	bled?
							/ No
							/ No / No
							/ No
10.	If you have a balance due, how	would you like to pay it?	? Direct	t Withdrawal	Ма	ail a Che	?ck
11.	If you are owed a refund, how	would you like to recei	ve it? Direct Depo	osit C	heck via Mail	Appl	ly to 2025
	If you would like direct depo	osit/withdrawal, please f	fill in banking informatic	on below if not	already on file.		
	Financial Institutions	(circle	(circle one)				
	Routing number:					Savings	
		lumber:					
12.	Please fill in your drivers licer	nse information if it ha	as been renewed or is	not on file.			
	Taxpayer DL Number						
13.	Did you receive, sell, send, ex	change or otherwise a	acquire virtual currence	cy during 202	4?	Yes	No
14.	Did you receive any unemplo (You may have to go online to prin		es, please attach form	1099-G.		Yes	No
15.	Did you receive any gambling	winnings? If yes, plea	ase attach form W2-G.			Yes	No
16.	Did you receive any disability	income? If yes, please	e include documentati	ion.		Yes	No
17.	Did you receive payment for	jury duty? If yes, pleas	se include documentat	tion.		Yes	No
18.	Did you receive alimony payn	nents? If yes, please ir	nclude documentation	ı.		Yes	No
19.	Did you sell any real estate? I	f yes, please include t	he sellers statement o	or form 1099-	S.	Yes	No
20.	Did you purchase any real est	tate? If yes, please att	ach the closing statem	nent.		Yes	No
21.	Did you contribute to an IRA employer).			0,		Yes	No
	If yes, please write what type	-	uted to and the amount	contributed.			
22.	Did you contribute to your HS If yes, please write the amou		e amount contributed th	rough employ	er).	Yes	No
23.	Did you receive distributions	from an HSA? If yes, p	lease attach form 109	99-SA.		Yes	No
	Did you have health insuranc If you have marketplace insu	e during 2024?				Yes	No

provider. 27. Did you pay for post high school education? If yes, attach form 1098-T, 1099-Q, 1099-E, or your institutions billings summary. (You may need to get this information online). Yes No 28. Did you pay for private school tuition (grades K-12)? If yes, please include documentation. All tuition, books, and fees must have been paid directly to the school. Yes No 29. Did you make any student loan payments? If yes, please attach form 1098-E. (You may have to go online to print this form.) Yes No 30. Did you pay property taxes in 2024? If yes, please attach form 1098. Yes No 31. Did you pay home mortgage interest? If yes, please attach form 1098. Yes No 32. Did you pay rent in 2024? If yes, please fill out the table provided. Yes No 33. Did you pay rent in 2024? If yes, please fill out the table provided. Yes No Xes No Yes / No No Xes Note: If claiming the homestead credit, attach rent certificate or 2024 tax bill. Yes No Xes Note: If claiming the homestead credit, attach rent certificate or 2024 tax bill. Yes No Xes If yes, please write the amounts paid below. Yes No No Xes If yes, please write the amounts paid below. Yes No	25. If you are a teacher, did you have any educator expenses? If yes, please write the total amount you spent.							No	
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