

# Mandatory Questions

Your return will NOT be completed until this form has been returned

Please check the appropriate box and include all necessary details and documentation for any "Yes" answer.

YES

NO

**Foreign Transactions during 2024- note "Foreign" does NOT include foreign investments held in a US brokerage account.**

Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from foreign bank or investment accounts, partnerships or a foreign employer? (**Not** including US brokerage or other stock accounts - e.g. Computershare)

Did you receive a distribution from, or were you a grantor or transferor to, a foreign trust?

Did you have any foreign financial accounts, foreign financial assets, or hold an interest in a foreign entity?

Did you have a financial interest in, or signature authority over, a financial account such as a bank account, securities account, or brokerage account **located in a foreign country** ?

**Virtual/Digital Assets (e.g. crypto currency) activity during 2024. I am required to answer these questions on your tax return,**

Did you sell, exchange or otherwise dispose of a digital asset (or a financial interest in a digital asset)? This includes income from an airdrop or a hard fork.

Did you receive digital assets as reward, award or payment for property or services?

**Be sure to complete the 2024 Client Organizer Checklist (yellow sheet)**

**Please also complete the 2024 Tax Organizer included with this packet and available as a fillable pdf on my website.**

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