

2024 SUPPLEMENTAL TAX QUESTIONNAIRE

FOREIGN ACCOUNTS (circle YES or NO)

- 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? **YES NO**

- Did you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity? **YES NO**

- If **YES**, please provide details _____

DIGITAL ASSETS (circle YES or NO)

- At any time during 2024, did you receive (as a reward, award, or payment for property or service), sell, exchange, gift or otherwise dispose of any financial interest in any digital asset? **YES NO**

If you answered YES complete this section: (circle YES or NO)

- Did you dispose of any digital assets, which you held as a capital asset, through a sale, trade, exchange, payment or other transfer? **YES NO**
- Did you receive digital assets as ordinary income? **YES NO**
- Did you receive any digital asset as compensation for services? **YES NO**
- Did you dispose of any digital asset by gift? **YES NO**
- Were the digital assets held in a foreign exchange? **YES NO**

Taxpayer Signature: _____

Date: _____

Spouse Signature: _____

Date: _____

For Office Use Only: Client Code: _____