2025 Tax Questionnaire

Please complete and return questionnaire with your tax documents



Name(s)					
Address	City	State	Zip		
Cell Phone	Email				
Cell Phone	Email				
Home Phone	Check here	if you are a returning	a client and your		
Yes No		mation is unchanged fro	= -		
Are you a new client?					
Yes No PERSONAL INFORMATION					
Marital status change from last year - please explain:			<u></u>		
If yes, did you change your name with the Social Serce	If yes, did you change your name with the Social Sercurity Administration?				
Address change from last year - please fill out the address section above, if changed					
Changes in dependents from the prior year - please expla	ain:				
Dependents filing a tax return - if you are claiming them they can't claim themselves on their return					
Provide over half the support for any other person(s) other	Provide over half the support for any other person(s) other than your dependent children during the year - explain:				
If you are divorced or separated with child(ren), do you ha	ave documentation whi	ch establishes custodial re	sponsibilities?		
If so, please provide a copy for our records					
Yes No MISCELLANEOUS INFORMATION					
Foreign bank accounts or interest in foreign businesses	Foreign bank accounts or interest in foreign businesses or assets?				
Sell cryptocurrency in 2025 - provide details of the sale a	Sell cryptocurrency in 2025 - provide details of the sale and original purchase of the currency				
Receive IRS correspondence during the year - provide cop	Receive IRS correspondence during the year - provide copy				
Make gifts of more than \$19,000 to any individual?	Make gifts of more than \$19,000 to any individual?				
Engage in any bartering transactions?					
Pay any individual as a household employee during the ye	ear?				
Yes No REFUND & PAYMENT OPTIONS					
Direct deposit bank information (required for refund) - if u	unsure, please provide [,]	voided check			
Routing Number:	_				
Account Number:	_				
Yes No INCOME					
Work for someone - W-2s					
Find yourself unemployed - 1099-Gs					
Earn interest on your money - 1099-INTs					
Invest in the market - 1099-DIVs and 1099Bs					
Enjoy social security benefits - SSA-1099s					
Retirement income - 1099-Rs					
Partner in a partnership or shareholder in an S-Corporation	on - K-1 Forms				
Receiving income from a trust or estate - K-1 Forms					

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Gambling -W-26s and your expenses/losses Receive a state or local tax refund in 2025 - 1099-G Rent your property in 2025 Income, including 1099-MISC (by property) Expenses, including mileage (by property) Self-employed - bring records of income, expenses, assets, and liabilities Farming - bring same records as self-employed Self your home - bring 1099- (if applicable), closing statement, and original cost of the home you sold Self other real estate - bring closing statement, original cost, improvements, and date of purchase of property Any other income - bring 1099-MISC form and records of any related expenses Yes No EXPENSES Contribute to an HSA, SEP, SIMPLE, or plan to by 04.15.2026 - provide amounts contributed for you and/or spouse Contribute to an HSA, or plan to do so by 04.15.2026 - provide amounts contributed for more analysis of the discussion of the plan to do so by 04.15.2026 - provide amounts contributed for more posses Educator - bring your unreimbursed expenses up to \$300 per educator In the reserves - bring your expenses Move while on active duty - provide distance and your direct costs Paying student loans - 1098-Es If you or your child is attending college - 1098-T as well as the cost of items like books, supplies, and equipment Paying/receiving alimony for divorce finalized by 12.31.2018 - provide amount paid/received in 2025 To determine if you can itemize, please provide the following: List of your medical deduction Property, sales tax, and license tab fees Mortgage/home-equity loan interest paid to buy, build or improve your home List of charitable contributions (you need a receipt for donations over \$250) Gambling losses incurred with gambling winnings Pay for childcare while working - bring provider name, ID number, address, and amount paid during 2025 Receive an ACA/Marketplace premium tax credit - 1095-A Make any out-of-state purchases for which the seller did not collect state sales or use tax - report amount of purchases Copy of your drivers license taxpayer/spouse Copy of letter	Yes	No	INCOME (continued)			
Rent your property in 2025 Income, including 1099-MISC (by property) Expenses, including mileage (by property) Self-employed - bring records of income, expenses, assets, and liabilities Farming - bring same records as self-employed Sell your home - bring 1099-S (if applicable), closing statement, and original cost of the home you sold Sell other real estate - bring closing statement, original cost, improvements, and date of purchase of property Any other income - bring 1099-MISC form and records of any related expenses Yes No EXPENSES Contribute to an IRS, SEP, SIMPLE, or plan to by 04.15.2026 - provide amounts contributed for you and/or spouse Contribute to an IRS, or plan to do so by 04.15.2026 - provide amounts contributed for mount and form 1099-SA Educator - bring your unreimbursed expenses up to \$300 per educator In the reserves - bring your expenses Move while on active duty - provide distance and your direct costs Paying student loans - 1098-Es If you or your child is attending college - 1098-T as well as the cost of items like books, supplies, and equipment Paying/receiving alimony for divorce finalized by 12.31.2018 - provide amount paid/received in 2025 To determine if you can itemize, please provide the following: List of your medical deduction Property, sales tax, and license tab fees Mortgage/home-equity loan interest paid to buy, build or improve your home List of chairtable contributions (you need a receipt for donations over \$250) Gambling losses incurred with gambling winnings Pay for childcare while working - bring provider name, ID number, address, and amount paid during 2025 Receive an ACA/Marketplace premium tax credit - 1095-A Make any out-of-state purchases for which the seller did not collect state sales or use tax - report amount of purchases Copy of your drivers license taxpayer/spouse Copy of letter from IRS with assigned IP PIN number for 2025 year, if applicable List of all 2025 quarterly estimated taxes paid for federal and state (amounts and dates), if appli			Gambling - W-2Gs and your expenses/losses			
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Your Signature Date			We tried to cover every situation, but please provide any other information you think we may need!			
	Your	· Sigr	nature Date			