

2025 Tax Questionnaire

Please complete and return questionnaire with your tax documents



HERITAGE
TAX & ACCOUNTING

Name(s) _____

Address _____ City _____ State _____ Zip _____
Name of initials for phone

Cell Phone _____
Name of initials for phone

Cell Phone _____

Home Phone _____

Email _____

Email _____

Check here ☐ if you are a returning client and your contact information is unchanged from last year.

Yes No

☐ ☐ Are you a new client?

Yes No **PERSONAL INFORMATION**

☐ ☐ Marital status change from last year - please explain: _____

☐ ☐ If yes, did you change your name with the Social Security Administration?

☐ ☐ Address change from last year - please fill out the address section above, if changed

☐ ☐ Changes in dependents from the prior year - please explain: _____

☐ ☐ 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 than your dependent children during the year - explain: _____

☐ ☐ If you are divorced or separated with child(ren), do you have documentation which establishes custodial responsibilities?

If so, please provide a copy for our records

Yes No **MISCELLANEOUS INFORMATION**

☐ ☐ Foreign bank accounts or interest in foreign businesses or assets?

☐ ☐ Sell cryptocurrency in 2025 - provide details of the sale and original purchase of the currency

☐ ☐ Receive IRS correspondence during the year - provide copy

☐ ☐ Make gifts of more than \$19,000 to any individual?

☐ ☐ Engage in any bartering transactions?

☐ ☐ Pay any individual as a household employee during the year?

Yes No **REFUND & PAYMENT OPTIONS**

☐ ☐ Direct deposit bank information (required for refund) - if 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 - **K-1 Forms**

☐ ☐ Receiving income from a trust or estate - **K-1 Forms**

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Yes No INCOME (continued)

- | | | |
|--------------------------|--------------------------|--|
| ☐ | ☐ | Gambling - W-2Gs 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 |
| ☐ | ☐ | 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 HSA, or plan to do so by 04.15.2026 - provide same information as above 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 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 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 applicable |

We tried to cover every situation, but please provide any other information you think we may need!

Your Signature _____ Date _____