

# 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)

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Gambling - <b>W-2Gs</b> and your <b>expenses/losses</b>  |
| <input type="checkbox"/> | <input type="checkbox"/> | Receive a state or local tax refund in 2025 - <b>1099-G</b>  |
| <input type="checkbox"/> | <input type="checkbox"/> | Rent your property in 2025   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Income, including 1099-MISC</b> (by property)   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Expenses, including mileage</b> (by property)   |
| <input type="checkbox"/> | <input type="checkbox"/> | Self-employed - bring <b>records of income, expenses, assets, and liabilities</b>                                      |
| <input type="checkbox"/> | <input type="checkbox"/> | Farming - bring <b>same records as self-employed</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | Sell your home - bring <b>1099-S (if applicable), closing statement, and original cost of the home you sold</b>        |
| <input type="checkbox"/> | <input type="checkbox"/> | Sell other real estate - bring <b>closing statement, original cost, improvements, and date of purchase of property</b> |
| <input type="checkbox"/> | <input type="checkbox"/> | Any other income - bring <b>1099-MISC form and records of any related expenses</b>                                     |

## Yes No EXPENSES

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Contribute to an <b>IRS, SEP, SIMPLE, or plan to by 04.15.2026</b> - provide <b>amounts contributed for you and/or spouse</b> |
| <input type="checkbox"/> | <input type="checkbox"/> | Contribute to an <b>HSA, or plan to do so by 04.15.2026</b> - provide <b>same information as above and form 1099-SA</b>       |
| <input type="checkbox"/> | <input type="checkbox"/> | Educator - bring your <b>unreimbursed expenses up to \$300 per educator</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | In the reserves - bring your <b>expenses</b>  |
| <input type="checkbox"/> | <input type="checkbox"/> | Move while on active duty - provide <b>distance and your direct costs</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | Paying student loans - <b>1098-Es</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | If you or your child is attending college - <b>1098-T as well as the cost of items like books, supplies, and equipment</b>    |
| <input type="checkbox"/> | <input type="checkbox"/> | Paying/receiving alimony for divorce finalized by 12.31.2018 - provide <b>amount paid/received in 2025</b>                    |
| <input type="checkbox"/> | <input type="checkbox"/> | To determine if you can itemize, please provide the following:  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>List of your medical deduction</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Property, sales tax, and license tab fees</b>  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Mortgage/home-equity loan interest paid to buy, build or improve your home</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>List of charitable contributions</b> (you need a receipt for donations over \$250)   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Gambling losses incurred with gambling winnings</b>  |
| <input type="checkbox"/> | <input type="checkbox"/> | Pay for childcare while working - bring provider <b>name, ID number, address, and amount paid during 2025</b>                 |
| <input type="checkbox"/> | <input type="checkbox"/> | Receive an ACA/Marketplace premium tax credit - <b>1095-A</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | Make any out-of-state purchases for which the seller did not collect state sales or use tax - report amount of purchases      |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Copy of your drivers license taxpayer/spouse</b>   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Copy of letter from IRS with assigned PIN number for the 2026 year, if applicable</b>                                      |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>List of all 2025 quarterly estimated taxes paid for federal and state (amounts and dates), if applicable</b>               |

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

Your Signature \_\_\_\_\_ Date \_\_\_\_\_