

# 2025 Tax Questionnaire

Please complete and return questionnaire with your tax documents



**HERITAGE**  
TAX & ACCOUNTING

Name(s) \_\_\_\_\_

Address \_\_\_\_\_ Name of initials for phone City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Cell Phone \_\_\_\_\_ Name of initials for phone

Cell Phone \_\_\_\_\_

Home Phone \_\_\_\_\_

Yes No

Are you a new client?

Email \_\_\_\_\_

Email \_\_\_\_\_

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

## 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 PIN number for the 2026 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 \_\_\_\_\_