



2025 Tax Questionnaire

Please complete and return this questionnaire with your tax data

Name(s) _____

Address _____ City _____ State _____ ZIP _____

Cell Phone () _____ Name or Initials for phone _____ Email _____

Cell Phone () _____ Name or Initials for phone _____ Email _____

Home Phone () _____

Yes No

☐ ☐ Are you a new client?

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

PERSONAL INFORMATION

☐ ☐ Did your marital status change during the year? If so, please explain: _____

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

☐ ☐ Did your address change from last year? If so, please fill out the address section above.

☐ ☐ Were there any changes in dependents from the prior year? If so, please explain: _____

☐ ☐ Do you have dependents who must file a tax return?

☐ ☐ Did you provide over half the support for any other person(s) other than your dependent children during the year?

☐ ☐ If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?

MISCELLANEOUS INFORMATION

☐ ☐ Do you have any foreign bank accounts, or interest in foreign businesses or assets?

☐ ☐ Did you sell any cryptocurrency in 2025? If so, please provide details of the sale and original purchase of the currency.

☐ ☐ Did you receive IRS correspondence during the year? If so, please provide us with a copy.

☐ ☐ Did you make gifts of more than \$19,000 to any individual?

☐ ☐ Did you engage in any bartering transactions?

☐ ☐ Did you pay any individual as a household employee during the year?

REFUND OPTIONS (check all that apply)

☐ ☐ Direct deposited your refund last year? If so, would you like to again?

☐ Same bank account?

☐ Different Account? Please provide your bank account number and routing number.

☐ ☐ Did not direct deposit last year but would like to this year? Please provide bank account number and routing number.

****Please note that the IRS no longer issues paper checks. Bank account information is required to process any refund.**

INCOME

☐ Did you receive wages in 2025? If so, please provide all Forms **W-2**.

☐ Did you receive **overtime pay**? If so, your employer is responsible for providing the overtime premium amount eligible for exclusion. Please provide this documentation once received from your employer.

☐ Found yourself or your spouse unemployed? We'd like your **1099Gs**.

☐ Making some interest on your money? It's your **1099-INT** we need.

☐ Invested in the market? We'll need your **1099-DIVs and 1099Bs**.

☐ Enjoying social security benefits? Congrats, we need your form(s) **SSA-1099**.

☐ Receiving retirement income? It'll be **1099-R** forms that we will want to see.

☐ Did you make any **Qualified Charitable Distributions (QCDs)** from an IRA during the tax year? If so, please list the amount, date,

Income continued on back...

IRA custodian, and the recipient charity for each distribution.

- ☐ Are you a partner in a partnership or a shareholder in an S-Corporation? We are going to need your **K-1 form(s)**.
- ☐ And the same if you are receiving any income from a trust or estate.
- ☐ Got lucky at the casino or other gambling? If so, we could use your form **W-2G(s)** and your **expenses/losses**.
- ☐ If you received a state or local tax refund in 2025, please also bring in forms **1099-G** that you receive.
- ☐ Rent your property in 2025? Here's what we would like:
 - ☐ Your **income, including 1099-MISC**.
 - ☐ Your **expenses, including mileage**. (By property)
- ☐ Self-employed? Good for you! Please bring in all your **records of income, expenses, assets, and liabilities**.
- ☐ Farming? That's great! We'd like the **same records as for self-employed**.
- ☐ Sell your home? Please bring in form **1099-S, closing statement, and your cost of the home you sold**.
Sell any other real estate in 2025? Please provide the **closing statement, original cost, improvements and date of purchase of the property**.
- ☐ Any other income? Please bring in **1099-MISC form and records of any related expenses**.

EXPENSES

- ☐ Contribute to an **IRA, SEP, SIMPLE, or plan to do so by 4/15/26**? We will want **amounts contributed for you and/or spouse**.
- ☐ How about an **HSA, or plan to do so by 4/15/26**? We will need the **same information as above and form 1099-SA**.
- ☐ Are you an educator? We will want your **unreimbursed expenses up to \$300 per educator**.
- ☐ In the reserves? We salute you and request your **expenses**.
- ☐ Move while on active duty? We'd like to know **distance and your direct costs**.
- ☐ Paying on student loans? **1098-Es** we could use.
- ☐ Speaking of education... If you or your child is attending college, we will need your form **1098-T, as well as the cost of items like books, supplies, and equipment**.
- ☐ Paying/receiving alimony for a divorce that was finalized by 12/31/18? Please provide amount paid/received in 2025.
- ☐ Itemize your deductions? If so, here's what we need:
 - ☐ **List of your medical deductions**.
 - ☐ **Property, sales tax, and license tab fees**.
 - ☐ **Mortgage / home-equity loan interest paid to buy, build or improve your home**.
 - ☐ **List of charitable contributions**. (Note: you need a written receipt for any donation over \$250 given to an organization in one day).
 - ☐ **Gambling losses incurred with gambling winnings**.
- ☐ Paying for childcare while working? We'll want **name, ID number, address, and amount paid to the provider**.
- ☐ Make energy-efficient home improvements or purchase an electric vehicle in 2025? Please provide **details and costs**.
- ☐ Receive an ACA/Marketplace premium tax credit? We are going to need your **1095-A form(s)**.
- ☐ Did you make any out-of-state purchases for which the seller did not collect state sales or use tax? If so, we'll need the amount of purchases.
- ☐ Were you a victim of identity theft within the last year? We will need a **copy of your drivers license**. If you have received a **letter from the IRS with an assigned IP PIN number** for the 2025 tax year, please provide that, as well.
- ☐ Please provide a list of all quarterly estimated taxes paid (amounts and dates).
- ☐ Did you buy a new vehicle in 2025 that was assembled in the US, financed in your name, and pay interest on the loan? If yes, please provide the total loan interest paid and the vehicle VIN.

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

Your Signature _____ Date _____