

MM Tax Service, Inc.

Maria A. Migel, F.A.

2025 CLIENT QUESTIONNAIRE

Personal Information

Taxpayer & Spouse Name: _____

Change in marital status: ☐ married ☐ legally separated ☐ divorced ☐ widowed

Date: _____

*Name changes must match the Social Security Administration records

Taxpayer: _____ Spouse: _____
Email: _____

Phone: _____

Is your address the same as last year? ☐ Yes ☐ No, my new address is:

Address: _____

City: _____ State: _____ Zip: _____

*Please provide settlement statement for home sales or purchases

Rent Paid - WI Residence: \$ _____ ☐ includes heat ☐ does not include heat

Are you claiming the same dependents as last year? ☐ Yes ☐ No ☐ N/A
(provide new dependent information below)

Name: _____ SSN: _____ Birthdate: _____ Relationship: _____

Bank Account Information

☐ My bank account is the same as last year ~ please provide your account information if you are unsure which bank account was used last year (we cannot make changes after your return is e-filed)

☐ A voided check or the necessary bank account details will be provided with the rest of my tax documents

☐ Bank account information is provided below:

Bank Name: _____ Routing Number: _____ Account Number: _____ Type (savings, checking.) _____

Signing Your Completed Tax Return

You (and your spouse, if married) are required to sign an authorization before we can electronically file your tax returns. The authorization form(s) will be set up for you to sign electronically if you choose to receive a digital copy of your tax return. The authorization form(s) will be set up for you to sign on paper if you choose to receive only paper copies of your tax return.

Receiving your Tax Return

You (and your spouse, if married) are required to review your tax returns before they are filed. Please indicate how you would like to receive your copy of your tax return:

- ☐ Digital/Electronic Copy ~ we will email you a secure link to download & save your files
 - ~ IMPORTANT: WE NEED BOTH SPOUSES' EMAIL ADDRESSES FOR MARRIED COUPLES
 - ~ saving your files is required; the secure access link expires 14 days after it is sent
 - ~ ☐ Check here if you also need a paper copy mailed to you
 - ~ if you submitted paper tax documents to us, they will be returned to you by mail when your return is finished unless you request to pick them up
- ☐ Paper Copy ~ ☐ Mail or ☐ Pick Up

☐ Check here to have the paper copy mailed to you at a different address than is listed above

Address: _____

Required Questions

At any time during 2025, did you have a financial interest in or signature authority over a financial account located in a foreign country?

☐ Yes ☐ No

At any time during 2025, did you (a) receive (as a reward, award, or payment for property or service; or (b) sell, exchange or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

☐ Yes ☐ No

Did you or your family have health insurance for any part of 2025 through the Healthcare Exchange (Marketplace)?

☐ Yes ☐ No *(If yes, provide your 2025 Form 1095-A)*

Estimated Tax Payments

If we set up estimated (quarterly) taxes for you for 2025, did you pay them as instructed?

☐ Yes ☐ No *(if no, please supply date & amount of each payment made)*

Federal	Date	Amount Pd
Q1		
Q2		
Q3		
Q4		

State	Date	Amount Pd
Q1		
Q2		
Q3		
Q4		

Tax Refunds

The federal government is phasing out the use of paper checks and for the most part, the IRS has stopped issuing tax refunds via paper checks. Refunds will be delayed by at least 10 weeks for tax returns filed without direct deposit information

Would you like your tax refund(s), if any, directly deposited into your bank account?

☐ Yes ☐ No *(If yes, be sure Bank Account section on Page 1 is completed)*

Tax Payments

The federal government plans to stop accepting tax payments made via paper checks. While this has not happened yet, it is strongly recommended that taxpayers start making tax payments electronically, if you are not already doing so.

If you owe tax for 2025, how would you like to pay the amount(s) due?

- ☐ I will pay online *(instructions will be supplied in your letter)*
- ☐ I will pay by check *(payment vouchers will be provided to mail with your check)*
- ☐ Please have the payments automatically withdrawn from my bank account on the due date *(be sure Bank Account section on Page 1 is completed)*

If you owe estimated (quarterly) taxes for 2026, how would you like to pay them?

- ☐ I will pay online each quarter *(instructions will be supplied in your letter)*
- ☐ I will pay by check *(payment vouchers will be provided to mail with your check)*
- ☐ Please have each payment automatically withdrawn from my bank account on the due date. *(be sure Bank Account section on Page 1 is completed):*

Commonly Missed Items

Indicate if any of the following occurred in 2025 and provide the necessary documents (or details) with your tax information.

- ☐ Lottery or Gambling winnings - provide W-2G
- ☐ Unemployment Income - provide 1099-G
- ☐ Pay for Dependent Care Services - provide statement from care provider
- ☐ Paid Private School Tuition (Wisconsin) - provide statement from school
- ☐ Paid College Tuition - provide 1098-T
- ☐ Paid Student Loan Interest - provide 1098
- ☐ Made gifts of over \$18,000 to any individual
- ☐ Received notices from the IRS or State tax agencies
- ☐ Contributed or Withdrew from Edvest Account (Section 529 Plan)
- ☐ Are an Educator and had qualified Expenses used in Classroom

Questions & Comments

Please let us know if there is anything you would like us to be aware of while preparing your tax return, or anything you would like to discuss regarding the current year's return, by including a note or email when you submit your tax documents. Please note that we do not review questionnaires or tax documents until we begin preparing your return. At that time, we will contact you if any follow-up is needed. Questions or discussions related to future tax years are best addressed after tax season.

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