



LML Tax & Accounting Services, LLC

Lydia M. Lesser, CPA

2195 Skyline Drive | Bethlehem, PA 18015 | 610.222.6167

Lydia@lmlcpaservices.com | www.lmlcpaservices.com

Client Questionnaire

Name: _____

Life events

The following questions apply to the 2025 tax year unless otherwise specified

	Yes	No
Did your marital status change?	<input type="checkbox"/>	<input type="checkbox"/>
Did your address change?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive a notice or letter from the IRS or a state revenue agency?	<input type="checkbox"/>	<input type="checkbox"/>
Did you change employment this year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you buy, sell, or refinance a home or rental property?	<input type="checkbox"/>	<input type="checkbox"/>
Did you convert or roll over any retirement accounts?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any contributions to a 529 or ABLE account (college plan)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any virtual currency or digital asset transactions in 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have a financial interest in or signature authority over a foreign account or trust?	<input type="checkbox"/>	<input type="checkbox"/>
Did the combined value of all foreign accounts exceed \$10,000 at any time during the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you gift \$19,000 or more to another individual?	<input type="checkbox"/>	<input type="checkbox"/>
Did you purchase health insurance through the ACA Marketplace (Pennie or GetCoveredNJ if in PA or NJ)?	<input type="checkbox"/>	<input type="checkbox"/>
Did you buy/finance a new car in 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Did you start a business or form an LLC this year?	<input type="checkbox"/>	<input type="checkbox"/>

Income

Type(s) of income received during 2025

Employment (W-2)	<input type="checkbox"/>
Overtime Pay	<input type="checkbox"/>
Tip Income	<input type="checkbox"/>
Retirement Distribution (1099-R)	<input type="checkbox"/>
Social Security (SSA-1099)	<input type="checkbox"/>
Self-employment (1099-NEC/1099-K)	<input type="checkbox"/>
State or local tax refund (1099-G)	<input type="checkbox"/>
Unemployment (1099-G)	<input type="checkbox"/>
Interest (1099-INT)	<input type="checkbox"/>
Dividends (1099-DIV)	<input type="checkbox"/>

Deductions & Credits

Non-itemized deductions and credits

Adoption expenses	<input type="checkbox"/>
Alimony from a divorce finalized on or before December 31, 2018	<input type="checkbox"/>
Child or dependent care expenses	<input type="checkbox"/>
Educator expenses (K-12 teachers)	<input type="checkbox"/>
Energy-efficient home improvements	<input type="checkbox"/>
Higher education expenses	<input type="checkbox"/>
Health savings account (HSA) contributions	<input type="checkbox"/>
Individual retirement arrangement (IRA) contributions	<input type="checkbox"/>
Moving expenses related to a permanent change of duty station	<input type="checkbox"/>
Personal vehicle loan interest	<input type="checkbox"/>

- Sold stock or investments (1099-B)
- Canceled debt (1099-C)
- Rents (1099-MISC)
- Royalties (1099-MISC)
- ESA or 529 distribution (1099-Q)
- HSA or MSA distribution (1099-SA)
- Partnership (Schedule K-1)
- S-corporation (Schedule K-1)
- Estate or trust (Schedule K-1)
- Gambling (W2-G)
- Farming
- Other Income

- Plug-in electric vehicle purchase
- Student loan interest

- Itemized deductions**
- Medical expenses (cash paid)
 - Real estate taxes
 - Mortgage interest
 - Donations to charity (cash)
 - Donations to charity (non-cash)
 - Casualty and theft losses
 - Gambling losses

Additional Information

Estimated taxes Yes No
 Did you make any 2025 estimated tax payments?

Federal

Q1
Q2
Q3
Q4

State:

Q1
Q2
Q3
Q4

Would you like a hard copy of your tax return for an extra \$35? (Circle One) Yes No

The IRS essentially phased out mailing refund checks!

Without direct deposit information, you will receive a notice from the IRS, which will require a response, and your refund will be delayed.

If you have issues obtaining your refund, and your return is filed without direct deposit information, it will be an additional service fee for us to assist you with this IRS notice and/or obtain your refund.

If you are due a refund, how would you like to receive it?

- Deposit to bank account
- Mailed check (there will be a notice and delays)

If you owe a balance:

- Withdraw from bank account
- Mail a check

Changes in Information:

NEW Address: _____ City/State: _____

Date Moved: _____

Phone: _____