

2025 TAX QUESTIONNAIRE

JAY HANSEN CPA, PLLC

NAME: _____ DATE: _____

PHONE: _____ ADDRESS: _____

(Only if you have moved)

1. Have you or your spouse **Renewed** your Drivers License?

If Yes, Provide us a copy of the front.

2. Did you have Health Insurance through the **Marketplace** Healthcare in 2025?

If Yes, Provide your Health Insurance Form **1095-A**

3. Did you or any of your dependents attend **College** in 2025?

If Yes, Provide form **1098-T**

4. Did you receive **Paypal or Venmo Payments** in excess of \$5,000?

If Yes, Provide form **1099-K**

5. Did you purchase a **NEW USA MADE VEHICLE**?

If Yes, Provide the VIN # , Purchase Price, & amount of Interest paid in 2025.

6. Any Changes to your **Filing status or Address**? ie. Marriage/Divorce/ Birth of Child

If Yes, provide changes, and any new Dependent SS#/DOB/Name & Gender.

7. Were you set up to make **Quarterlies/ Estimated Tax Payments**? (Jan/April/June/Sept)

If Yes, did you make all payments as set up?

8. Did you sell, trade, or earn income from **Digital Currency** (ex. Bitcoin/Dogecoin/Crypto)?

If Yes, Provide a gain loss report.

In September of 2025 an executive order mandating the electronic transfer of all funds to and from the IRS became effective. The option for a refund on a paper check or payment with a check is no longer available.

Please provide us a **voided check** or other form showing your banking information.

STAFF USE: Email

In office

Mailed