



## 2025 Tax Client Information and Questionnaire

### Filing status for 2025

- \_\_\_\_\_ Single - *can someone claim you on another tax return?* (YES or NO)  
\_\_\_\_\_ Married filing jointly  
\_\_\_\_\_ Married filing separately  
\_\_\_\_\_ Head of Household- unmarried with a qualifying dependent and paid more than 50% of household expenses  
\_\_\_\_\_ Qualifying surviving spouse

### Tax Prep Information

	Taxpayer #1	Taxpayer #2 (spouse)
Full Name		
Soc Sec #		
Date of Birth		
Occupation		
Email		
Phone #		
US Citizen	YES or NO	YES or NO
Blind or Disabled	YES or NO	YES or NO
Driver's License #		
State of Issuance		
Issue Date		
Exp Date		
Current Home Address		
Did you move in 2025? Provide Previous Address		

### Do you have dependents to report?

Full Name	DOB	Soc Sec #	Relationship son, daughter, etc	Will you claim in 2025? Yes or No	Adopted or Disabled?



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Please answer YES or NO

Are you a new client of Grube CPA? If yes, please provide previous year tax return.	
Did you purchase health care from a government Marketplace? If yes, provide form 1095-A	
Did you contribute to a health savings account? If yes, provide form 1099-SA	
Did you at any time during 2024, receive, sell, exchange, or dispose of any virtual currency?	
Is anyone in your household a full-time college student? If yes, provide form 1098-T	
Did you pay student loan interest? If yes, please provide form 1098-E	
Did you pay child/dependent care in 2024? If yes, please provide person SS# or company tax id#, address, and amount spent.	
Do you have small business or rental income to report? If yes, please provide a profit/loss statement with total income and expenses	
Have you been issued an identity PIN by the IRS? If yes, please provide 6-digit PIN.	
Did you contribute to an IRA? If yes, provide \$amount and traditional, Roth IRA, or ABLE	
Did you contribute to a 529 savings plan? If yes, please provide statement	
Did you pay IN property taxes? If yes, please provide amount or statement	
Did you buy or sell a home in 2025?	
Did you pay Federal or State estimated tax in 2024? If yes, please provide dates paid and amount	
Are you interested in a refund transfer to deduct fees from your refund? *A <i>Refund Transfer is a fee-based product offered by Republic Bank &amp; Trust Company, Member FDIC. A Refund Transfer Fee and all tax prep fees from Grube CPA will be deducted from your tax refund.</i>	

### Bank Account for Refunds

\_\_\_\_\_ I am a returning client. Please use the bank account on file for direct deposit.

\_\_\_\_\_ I would like a check mailed to me from the IRS.

\_\_\_\_\_ I would like direct deposit. Please use the bank account below:

Name of Bank	
Checking or Savings?	
Routing Number	
Account Number	

CLIENT SIGNATURE X \_\_\_\_\_ Date \_\_\_\_\_