

### CRYPTO QUESTIONNAIRE

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

**YES** - I have participated or received one of the below items (please check all that I apply):

- ☐ Received digital assets as payment for goods or services provided
- ☐ Received digital assets as a result of a reward, gift or award
- ☐ Received new digital assets as a result of mining, staking and similar activities
- ☐ Received digital assets as a result of a hard fork
- ☐ Disposed of digital assets in exchange for property, goods or services
- ☐ Disposed of a digital asset in exchange or trade for another digital asset
- ☐ Sold a digital asset Transferred digital assets for free (without receiving any consideration) as a bona fide gift
- ☐ Otherwise disposed of any other financial interest in a digital asset

**NONE** of the above, but I have participated in the below:

- ☐ Holding a digital asset in a wallet or account
- ☐ Transferring a digital asset from one wallet or account to another wallet or account owned by the same taxpayer
- ☐ Purchasing digital assets using US or other real currency, including through the use of electronic platforms such as Paypal or Venmo
- ☐ If the taxpayer's only transactions involving virtual currency during 2023 were purchases of virtual currency for real currency, including the use of real currency electronic platforms such as PayPal and Venmo, they are not required to check the "Yes" box next to the virtual currency question.

- If the taxpayer disposed of any virtual currency that was held as a capital asset through a sale, exchange, or transfer, check “Yes” and use Form 8949 to figure the capital gains or loss and report it on Schedule D (Form 1040).

### CRYPTO ENGAGEMENT AGREEMENT

Tax Laws applying to virtual currency are subject to change and/or reinterpretation by IRS or Congress.

The tax return will be prepared using client-provided information and under virtual currency tax law as is now understood.

The tax preparer is not liable for the taxes, penalties or interest that result from client withholding information or from virtual currency tax laws changes or reinterpretations.

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Name (please print)

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Name (please print)

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Signature

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Date

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Signature

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Date