

PERSONAL TAX QUESTIONNAIRE

Name: _____ **Tax Year** _____

Please answer the following questions to determine maximum deductions:		YES	NO
COMMUNICATION & BASIC CHANGES			
Would you like to receive text message regarding your account (return status, appointments, etc.)			
If yes, what number would you like us to use for texts	Contact Name		
Did your marital status change during the year?			
Did your address change during the year?			
Were there any changes in dependents? (For any new dependent, provide copy of social security card)			
Can any of your dependents be claimed on someone else's tax return?			
Did any of the dependents you are claiming file their own tax return? If yes, please send copy of their tax return			
Did any dependent turn 17, 18, 24, or graduate during 2025?			
INCOME AND EMPLOYMENT			
Did you change jobs during the year?			
Did you have any overtime pay on your paycheck? If yes, provide last paystub			
Did you receive unreported tip income?			
Did you receive unemployment, disability, severance, back pay, or settlement income?			
Did you receive income through Venmo, PayPal, Cash App, Zelle, Stripe, Square, or similar platforms?			
Did you receive any 1099-NEC, 1099-K, or other non-W-2 income?			
Did you or your spouse receive Social Security Benefits?			
Did you pay or receive preexisting ¹ alimony? Paid \$ _____ Received \$ _____			
Date of Original Divorce or Separation agreement <small>(only allowable for divorces finalized before 1/1/2019)</small>			
Did you have any gambling income, and do you have proof of losses?			
Did you buy or sell any stocks, bonds, or other investment property?			
RETIREMENT, HSA & BENEFITS			
Did you contribute to a retirement plan (401(k), traditional/ROTH IRA, SEP, SIMPLE)?			
Did make any distributions from a retirement plan (401(k), IRA, pension, etc.)?			
Did you convert part or all of your traditional/SEP/SIMPLE IRA to a ROTH IRA?			
Did you roll over or transfer a retirement account during 2025?			
Did you contribute to a Health Savings Account (HSA)?			
Did you have any distributions from your Health Savings Account (HSA)?			
Did you use any HSA funds for non-medical expenses?			
REAL ESTATE & PROPERTY			
Did you buy, sell, refinance, or take out a home equity loan on a primary or second home?			
Did you buy or sell a home during the year? If yes, please enclose a copy of the closing statement(s)			
Do you have a mortgage on your home in which you paid interest on?			
Did you pay any real estate taxes on property?			
Did you pay any sales tax on major purchases during 2025, such as a new vehicle, boat, motorcycle or manufactured home?			
DEDUCTIONS, CREDITS & PAYMENTS			
Did you take out a new auto loan in 2025 for a new vehicle?			
Did you pay any student loan interest?			
Do you buy any internet merchandise for which you did not pay sales/use tax?			
Did you make any cash or non-cash charitable donations to a qualified 501(c)(3) organization?			

Note: If you answered YES to any of the above, please provide further details.

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If yes, do you have proof for all charitable donations?					
Did you incur any expenses in connection to an adoption of a child?					
Did you pay for childcare so you could work or attend school?					
Did you pay anyone for domestic/household services at your personal residence(s)?					
Did you make any energy-efficient improvements to your home?					
Were you noticed by the IRS that the Earned Income Credit cannot be claimed in 2025?					
Did you have health care coverage with a government Marketplace (Exchange) during 2025. Please send Form 1095-A, issued by the Marketplace. In some family situations you may have more than one 1095-A.					
Are you claiming someone on your tax return who was covered on another taxpayer's policy with the Marketplace? If so, then you will also need to send us a copy of that taxpayer's 1095-A.					
Did you make any estimated tax payments? If yes, please provide check date(s) and amount(s) of each check					
ES #1	ES #2	ES #3	ES #4		
GIFTS, DEBT & LOSSES					
Did you and/or your spouse give a gift(s) of more than \$19,000 to one or more people during 2025?					
Did you have any debt cancelled or forgiven (credit cards, loans, foreclosures, repossessions, bankruptcy)?					
Did you incur a loss because of damaged or stolen property?					
Did you incur losses from damages that occurred in a federal declared disaster area?					
EDUCATION, FOREIGN & DIGITAL ASSETS					
Were you or any of your dependents attending college during 2025?					
Were you a citizen of, have income from, or live in a foreign country?					
Do you have any foreign bank or financial accounts?					
At any time during 2025, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?					
ADMINISTRATIVE AND OTHER MISCELLENOUES ITEMS					
Do you want to electronically file your tax return?					
May the IRS discuss your tax return with your preparer?					
Should you receive a refund, would you like it direct deposited into your bank account? If yes, provide bank information (VOID CHECK) with your tax documents					
Do you want a paper copy of your tax return? A digital copy of the return will be issued either way					
If you sent us original documents, how to you want them returned to you?					
Pick up the office?	<input type="checkbox"/>	Priority Mailed?	<input type="checkbox"/>		
Is there anything else that changed in 2025 that you believe could affect your taxes (income, assets, family, or finances)?					

Signature: _____ **Date:** _____

Note: If you answered YES to any of the above, please provide further details.