

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 _____ (only allowable for divorces finalized before 1/1/2019)			
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 MISCELLANEOUS 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.