

2025 Tax Year Client Annual Questionnaire

Please provide answers to EVERY question. We will not be able to finalize your tax return without this form. Thank you!

Client Name: _____ Client Signature: (use a cursive font to sign) _____

1. Has the following information changed? If yes, please upload the updated information with the rest of your documents:
 - a. Address? Yes No
 - b. Your Email? Yes No Spouses Email? Yes No
 - c. Bank deposit information? Yes No
 - d. Spouses Email address if we don't already have it: _____
2. Are you required to file with an ID Theft PIN that is provided by the IRS each year? Yes No If yes, please provide a copy of the PIN _____
3. Did you or your spouse make gifts of over \$19,000 to an individual or contribute to a prepaid tuition plan? Yes No
4. Do you have any foreign bank accounts or foreign retirement accounts? Yes No If yes, did the highest balances in the account during the year ever total \$10,000 or more? Yes No If yes, we will need the following information: Bank name/address/account number/highest balance for EACH account.
5. At any time during the year, did you/spouse receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? Yes No If yes, please include the new 1099-DA.
6. Did you purchase health insurance from the Health Insurance Marketplace? Yes No If yes, please be sure to get a copy of your 1095-A and include it with your tax documents. We cannot file your return without this document.
7. Has there been a change in the number of dependents you can claim on your 2025 return? (for example, did any of your children graduate college or get married, over 16 but not in school and made more than \$5,200, birth of a child) Yes No If yes, please provide details:

8. Did you/spouse/dependent attend post-secondary school in 2025? Yes No If yes, please include any 1098-T's you received, and download the appropriate Education Questionnaire from our website at <https://businessharmony.life/client-documents>
9. Did a lender cancel any of your debt in 2025? Yes No If yes, please include forms 1099-A or 1099-C
10. Did you take any distributions out of your 401K or traditional IRA accounts, or receive payments from your pension? Yes No If yes, please be sure to provide us with 1099R's reflecting those distributions.
11. Did you or your spouse inherit an IRA in 2025? Yes No
12. Are you or your spouse required to take Required Minimum Distributions (RMD's)? Yes No If yes, did you take them? Yes No
13. Did you/your spouse make contributions outside of your W2 jobs to a traditional IRA? Yes No A ROTH IRA? Yes No Please be sure to upload documentation to show the contributions.
14. Did you receive unemployment benefits? Yes No If yes, please be sure to provide us with your 1099-G.

15. Did you have any gambling winnings? Yes No If yes, please be sure to provide us with your W2G's and win/loss statements.
16. Did you or your spouse buy/sell any stocks or bonds? Yes No If yes, please be sure to provide us with copies of your 1099B.
17. Did you or your spouse receive any interest or dividend income? Yes No If yes, please be sure to provide us with copies of your 1099-INT/1099-Div's
18. Are your property taxes usually more than \$8,000? Yes No If yes, please be sure to include the amounts PAID during 2025 since the IRS increased the amount of deduction allowed.
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19. Did you purchase and finance (not leased) a new vehicle in 2025 that was assembled in the USA? Yes No If yes, please provide a copy of the purchase paperwork and total interest paid for the year.
20. Did you pay interest on student loans for you/spouse/dependent? Yes No If yes, please include your 1098 E.
21. Did you start a business, purchase a rental property, or farm, or acquire interest in partnerships, S Corporations, or trusts? Yes No _____
22. Do you expect any major changes in your income for 2026? Yes No If yes, please explain? _____
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23. If you made federal estimated tax payments or extension payments for the tax year, please list date **and** amounts: Q1 _____ Q2 _____ Q3 _____ Q4 _____
Extension Payment _____
24. Did you make sales or receive \$5,000 or more through a payment processor such as venmo, paypal, stripe, debit/credit card? Yes No If yes, please provide your 1099-K
25. If you have a refund, would you like to apply it to next years estimated taxes? Y N
26. New for 2025: Did you receive overtime pay in 2025? Yes No

If there is time, would you like us to include an on screen video of us going over the return? Yes No

There is no added charge for this, but it does add time, so please be respectful of this added service. If we are close to a deadline, we will be unable to provide the video.

Please be sure to download the applicable questionnaires from our website. If the forms are not included, it will delay the processing of your return. Thanks!

<https://businessharmony.life/client-documents>

Any additional information you need to add?