

# 2025 CLIENT TAX QUESTIONNAIRE



## SECTION 1: TAXPAYER INFORMATION

Taxpayer Full Name: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_ Occupation: \_\_\_\_\_

Email Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Current Address \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Address Change in 2025 or 2026?  Y  N      Marital Status Change in 2025?  Y  N      Lived in US more than half of 2025?  Y  N

Current Marital Status:  
 Single     Married     Divorced     Separated     Widow

## SECTION 2: SPOUSE INFORMATION

Spouse Full Name: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_ Occupation: \_\_\_\_\_

Email Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Lived apart from spouse during 2025?  
 Y      If yes, # of Months: \_\_\_\_\_

## SECTION 3: DEPENDENTS (CHILDREN AND OTHERS)

Name:	Relationship:	Date of Birth:	Social Security Number:	Months Lived With You in 2025	Full Time Student?	Provided More Than Half of the Support?
_____	_____	_____	_____	_____	<input type="checkbox"/> Y	<input type="checkbox"/> Y
_____	_____	_____	_____	_____	<input type="checkbox"/> Y	<input type="checkbox"/> Y
_____	_____	_____	_____	_____	<input type="checkbox"/> Y	<input type="checkbox"/> Y
_____	_____	_____	_____	_____	<input type="checkbox"/> Y	<input type="checkbox"/> Y
_____	_____	_____	_____	_____	<input type="checkbox"/> Y	<input type="checkbox"/> Y

- Do you provide a home or financial support for anyone else not listed above?  Y  N
- Were there any births, deaths, marriages, divorces or adoptions in your immediate family in 2025 or 2026? (If yes, please provide details in "Other Information" Section on page 3)  Y  N
- Are you eligible to be claimed as a dependent on another individual's tax return for the 2025 tax year?  Y  N
- If the IRS asks, do you have receipts or records to prove you qualify for the Child Tax Credit, Earned Income Tax Credit, or Head of Household filing status?  Y  N

## SECTION 4: INCOME INFORMATION

- Did you earn Income as an employee or independent contractor? (If yes, include W-2 and/or 1099-NEC)  Y  N
- Did you receive any Tips or Overtime Pay in 2025? (If yes, include documentation to support the totals)  Y  N
- Did you receive Unemployment Compensation in 2025? (If yes, include 1099-G)  Y  N
- Did you sell any Stocks or Investments in 2025? (If yes, include 1099-B)  Y  N
- Did you receive Interest Income from a savings account or dividends from mutual funds/ investments in 2025? (If yes, include Form 1099-INT and/or 1099-DIV)  Y  N
- Did you receive any Social Security benefits during 2025? (If yes, include SSA-1099)  Y  N
- Did you have any gambling winnings or losses, including lottery, bingo and raffles? (If yes, include W2-G)  Y  N
- Did you receive, sell, exchange or dispose of any virtual currency in 2025? (If yes, include 1099-DA)  Y  N

## SECTION 5: RETIREMENT INFORMATION

- Did you or your spouse receive payments/distributions from a retirement plan such as a pension, 401K, or IRA in 2025 or plan to in 2026? (If yes, include Form 1099-R)  Y  N
- Did you receive a distribution from a retirement plan to pay medical bills, for higher education expenses, or to purchase a home in 2025? If yes, list reason:  
  Y  N
- Did you make any contributions to a retirement plan such as a pension, 401K, IRA, SEP, SIMPLE in 2025?  Y  N
- Did you convert an IRA or a Roth IRA or perform a Backdoor IRA in 2025?  Y  N

## SECTION 6: HEALTH INFORMATION

- Did you purchase health insurance from the Healthcare.gov Marketplace in 2025? (If yes, include Form 1095-A)  Y  N
- Did you or your spouse participate in a Health Savings Account (HSA) or in a Medical Savings Account in 2025? (If yes, include Form 1099-SA and Form 5498-SA)  Y  N
- Did you/ spouse/dependent incur a substantial amount of unreimbursed medical expenses in 2025?  Y  N

## SECTION 7: HOUSING INFORMATION

- Do you own a home? (If yes, include Form 1098 – Mortgage Interest and 2025 Property Tax Statements)  Y  N
- Did you rent during 2025? If yes, and if total household income is less than \$71,500, answer the following:
  - a. Name and address of Landlord:
  - b. Monthly rent paid in 2025:
  - c. Number of months rented in 2025:
  - d. Is Heat included in your rent payment?  Y  N
- Did you sell and/or purchase a home in 2025 or 2026? (If yes, include Closing Disclosure & Form 1099-S)  Y  N
- Did you receive rent from real estate or other property? (If yes, include support for income and expenses)  Y  N
- Was your principal home or rental property foreclosed on in 2025 or 2026? (If yes, include 1099A or 1099C)  Y  N
- Did you make any energy efficient improvements to your home in 2025? (If yes, list amount \$ )  Y  N

## SECTION 8: CHILD AND DEPENDENT CARE

- Did you receive dependent care benefits from your employer in 2025?
- Did you pay any child/dependent care expenses in 2025 for a child under 13 years old or costs to care for a handicapped individual? If yes, complete the following:

Name of Child Care Provider:

Provider EIN/Social Security Number:

\_\_\_\_\_

\_\_\_\_\_

Provider Address:

Amount Paid to Provider:

\_\_\_\_\_

\_\_\_\_\_

## SECTION 9: EDUCATION

- Did you, your spouse or a dependent incur any tuition, fees or book expenses that were required to attend college, university or vocational school in 2025? (If yes, include 1098-T and support for expenses)  Y  N
- Did you, your spouse or a dependent receive scholarships or grants for higher education in 2025?  Y  N
- Did you, your spouse or dependent receive a distribution from a 529 Plan or Education Savings Plan in 2025? (If yes, include Form 1099-Q.)  Y  N
- Did you make any contributions to a 529 Plan or Education Savings Plan in 2025? (Include support)  Y  N
- Did you pay any Student Loan Interest in 2025? (If yes, include Form 1098-E)  Y  N

## SECTION 10: VEHICLE TAX DEDUCTIONS

If you purchased a new vehicle in 2025, please answer the following:

- Did you purchase a new or used plug-in Electric Vehicle before September 30, 2025? ( If yes, list the model, vehicle's Vehicle Identification Number (VIN), purchase date and cost of vehicle on the line below):  Y  N  
\_\_\_\_\_
- Did you take out a loan to purchase a vehicle in 2025? Up to \$10,000 in loan interest may be deductible if the vehicle qualifies. Visit [www.vpic.nhtsa.dot.gov/decoder](http://www.vpic.nhtsa.dot.gov/decoder) to determine if your new vehicle qualifies. (If yes, include document with Vehicle Identification Number (VIN) and interest paid in 2025)  Y  N

## SECTION 11: ITEMIZED DEDUCTIONS

Note: The IRS allows taxpayers to reduce their taxable income by claiming either the Standard Deduction or Itemized Deductions – whichever is higher. For 2025, the Standard Deduction is \$15,750 for Single Filers, \$23,625 for HOH and \$31,500 for Married Joint Filers. If you expect your Itemized Deductions to exceed your Standard Deduction, please complete this section.

- Did you make charitable contributions or donate items to charity in 2025? (If yes, include receipts or acknowledgements from charity, cancelled check or other proof)  Y  N
- Did you use your vehicle to provide volunteer services for charity? (If yes, list miles driven: \_\_\_\_\_)  Y  N
- Did you pay state taxes on a new vehicle purchased or leased in 2025?  Y  N
- List your vehicle registration fees paid in 2025: \$ \_\_\_\_\_  Y  N
- Did you owe State or Local taxes when you filed your 2024 Income Tax Return? If yes, please list amount paid in 2025: State Tax Paid: \$ \_\_\_\_\_ Local Tax Paid: \$ \_\_\_\_\_  Y  N

## SECTION 12: BUSINESS & INDEPENDENT CONTRACTOR INFORMATION

Note: Complete this section if you received a 1099-NEC, 1099-MISC, 1099-K or own a small business.

- Date you started your business or work as an independent contractor: \_\_\_\_\_
- Did you materially participate in this business in 2025?  Y  N
- Do you have records to support your business expenses? (If yes, include receipts and documentation)  Y  N
- Did you pay estimated taxes in 2025? (If yes, include documentation showing amounts paid)  Y  N
- Did you use your vehicle for your business?  Y  N
- Do you have written evidence to support your vehicle expenses? ( List your business mileage below)  Y  N

Business Miles Driven in 2025

Commuting Miles Driven in 2025

Other Miles Driven in 2025




## SECTION 13: FILING QUESTIONS

- Did you receive or request a 6-digit Identity Protection PIN number (IP PIN) from the IRS?  Y  N
- The IRS can deposit refunds directly into up to (3) taxpayer accounts. Beginning 2026, they will no longer issue refunds by paper check. Please provide your banking information below:

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Checking <input type="checkbox"/> Savings
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Checking <input type="checkbox"/> Savings
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Checking <input type="checkbox"/> Savings

## OTHER INFORMATION OR QUESTIONS

If you have other relevant information you would like your tax preparer to know, or you have specific questions about your tax returns, please provide them here.