

2025 RETURNING CLIENT TAX QUESTIONNAIRE

SECTION 1: TAXPAYER INFORMATION

Taxpayer Full Name: _____

Email Address: _____

Phone Number: _____

SECTION 2: ADDRESS CHANGE

Complete this section if your address changed in 2025 or 2026. If not, go to Section 3.

New Address: _____

City: _____

State: _____

Zip Code: _____

Did you buy or sell a home in 2025 or 2026? Y N (if yes, include a copy of Closing Disclosure Form)

SECTION 3: MARITAL AND FAMILY CHANGES

Complete this section if your marital status or family changed in 2025. If not, go to Section 4.

Select the option that best describes your marital status in 2025:

Single Married Divorced Separated Widow

Were there any births, deaths, or adoptions in your immediate family in 2025? Y N

Name: _____

Date of Birth: _____

Date of Death: _____

Social Security Number: _____

SECTION 4: INCOME INFORMATION

Please select the items of income that you received in 2025:

Wages (Include W-2)

Unemployment Compensation (Include 1099-G)

Tip Income

Overtime Pay (Include statement showing OT pay)

Interest Income (include 1099-INT)

Gambling Winnings (Include W-2-G)

Dividends (include 1099-DIV)

Independent Contractor (Include 1099-NEC/MISC)

Investment Sales (include 1099-B)

Rental Income (Include 1099-MISC or support)

Social Security (include SSA-1099)

Receipt or Sales of Digital Assets (Include 1099-DA)

Other: _____

SECTION 5: RETIREMENT/HEALTHCARE 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, attach Form 1099-R) Y N
- Did you receive an early distribution from a retirement plan due to pay medical bills, for college or to purchase a home? (If yes, list reason: _____) Y N
- Did you purchase Health Insurance from the Marketplace? (Attach Form 1095-A) Y N
- Did you participate in a Health Savings Account (HAS) in 2025? (If yes, attach Form 1099-SA and 5498-SA) Y N

SECTION 6: RENTERS

If your total household income is less than \$71,500, complete Section 6.

- Did you rent your home in 2025? Y N

Name and Address of Landlord: _____

Monthly Rent Paid in 2025: _____

Number of Months Rented: _____

SECTION 7: CHILD AND DEPENDENT CARE

- 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:** Y N

Name of Child Care Provide:	Provider EIN/Social Security Number:
<input type="text"/>	<input type="text"/>
Provider Address:	Amount Paid to Provider:
<input type="text"/>	<input type="text"/>

SECTION 8: TAX DEDUCTIONS

- | | |
|--|--|
| <input type="checkbox"/> College Tuition (include 1098-T) | <input type="checkbox"/> Mortgage Interest (include 1098) |
| <input type="checkbox"/> Student Loan Interest (include 1098-E) | <input type="checkbox"/> Property Tax Statements |
| <input type="checkbox"/> Contributions to 529 Education Plan | <input type="checkbox"/> Charitable Contribution Receipts |
| <input type="checkbox"/> Vehicle Registration Fee: | <input type="checkbox"/> Gambling Losses (if you had winnings) |
| <input type="checkbox"/> Unreimbursed Medical Expenses (if total amount paid is over 7.5% of your income) | |
| <input type="checkbox"/> Purchase of Electric Vehicle before September 30, 2025 | |
| <input type="checkbox"/> New Vehicle Loan Interest – vehicle must have been purchased in 2025 and undergone final assembly in the United States. Visit https://vpic.nhtsa.dot.gov/decoder/ to see if your new vehicle qualifies. | |

SECTION 9: FILING INFORMATION

- Did you receive a 6-digit IRS Identity Protection PIN Number? You can check online to see if you issued a PIN by visiting your IRS Online Account. Y N
- The IRS will only issue refunds by direct deposit this tax season. Do you want your refunds direct deposited into the bank account used on your 2024 Tax Return? If not, please enter your updated account information below. Y N

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.