

## Questionnaire

Name:

SSN:

Questionnaire

**Personal Information****Yes No**

- Did your marital status, name or address change during the year?  
If "Yes," explain. \_\_\_\_\_
- Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?  
If "Yes," provide Notice CP01A from the IRS.

**Dependent Information****Yes No**

- Did you have any changes in dependents during the year?  
If "Yes," explain. \_\_\_\_\_
- Can another person qualify to claim any of your dependents?
- Did you have any child or dependent care expenses during the year?
- Did you have any dependents with more than \$2,700 of unearned income (i.e. interest, dividend/capital gains)?

**Health Care Information****Yes No**

- Did any member of your household have healthcare coverage through the Marketplace (Obamacare)?  
If "Yes," provide copies of Form 1095-A.
- Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?

**Income, Purchases, Sales, and Debt Information****Yes No**

- Did you refinance your principal home or second home or take out a home equity loan during the year?  
If "Yes," provide all escrow, closing, and other pertinent documentation and information.
- Did you receive any principal or interest during this year from property sold in prior years?
- Did you have any debts canceled or forgiven this year?
- Did you purchase a new or previously owned clean vehicle (electric vehicle, plug-in hybrid, fuel-cell vehicle, qualified commercial clean vehicle) during the year?  
If "Yes," provide the report the dealer or seller is required to provide to you and the vehicle identification number (VIN).

**Itemized Deduction Information****Yes No**

- Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) that exceed 7.5% of your adjusted gross income in 2025?
- Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year?
- Did you pay any real estate property taxes or personal taxes during the year?
- Did you pay mortgage interest during the year?
- Did you make cash donations to charity during the year?
- Did you make noncash donations to charity (clothes, furniture, etc.) during the year?
- Did you have gambling winnings or losses during the year?

**Retirement Information****Yes No**

- Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
- Did you make any withdrawals or receive distributions from a pension or profit-sharing plan, IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
- Did you execute any rollovers from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
- Did you receive any Social Security benefits during the year?

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## Questionnaire

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**Education Information****Yes No**

- Did anyone in your household attend a post-secondary school during the year? Provide 1098-T.
- Did you make a contribution to or receive a distribution from an Education Savings Account (529 Plan) or Qualified Tuition Program during the year?
- Did you pay student loan interest for yourself, your spouse, or your dependents during the year?
- Did you receive forgiveness on a qualifying federal student loan?

**Foreign Tax Information****Yes No**

- Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?
- Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?
- Did the aggregate value of your foreign accounts exceed \$10,000 at any time during the year?
- Did you have any income from, or pay taxes to, a foreign country?

**Refund, Withholding, and Estimated Tax Information****Yes No**

- Did you make any estimated payments toward your 2025 taxes? Provide date and amount paid.
- Do you want to have any refund or balance due directly deposited or withdrawn? Direct deposit of refunds is recommended.  
If "Yes," provide a canceled checking or savings slip.
- Do you anticipate your income or withholdings to be different for 2026?  
Explain \_\_\_\_\_

**One Big Beautiful Bill Implications****Yes No**

- Did you receive qualified tips reported on Form W-2 or a statement provided by your employer?  
If "Yes," provide documentation or amount.
- Did you receive overtime pay reported on Form W-2 or a statement provided by your employer?  
If "Yes," provide documentation or amount.
- Did you purchase a new passenger vehicle for personal use during 2025?  
If "Yes," are all the following true:  
**Yes No**  
  The final assembly was in the US/GVW < 14,000 lbs/not leased/vehicle used to secure the loan.
- If you have a dependent born during 2025, do you want to establish a Trump Account?

**Miscellaneous Information****Yes No**

- Did you receive, sell, exchange, gift, or otherwise dispose of any digital asset or financial interest in any digital asset?  
If "Yes," provide any Forms 1099-DA received.
- Did you incur a gain or loss due to damaged or stolen property, while living in a federally declared disaster area?  
If "Yes," provide the incident date, value of the property, amount of insurance reimbursements, and the declaration number assigned by FEMA.
- Did you make gifts to any one person in excess of \$19,000 during the year?
- Did you make any energy-efficient improvements to your main home during the year?
- Did you make any purchases subject to use tax during the year?  
If "Yes," provide details.
- Did you receive any notices from the IRS or state taxing authority?  
If "Yes," explain. \_\_\_\_\_
- May the IRS discuss your tax return with your preparer?
- Would you like a copy of your tax return sent to you electronically instead of receiving a printed copy?

**Preparer Notes**