

Questionnaire

Name:

SSN: ***-**-****

Client Questionnaire

Personal Information

Yes No

- Did your marital status change during the year?
If "Yes," explain. _____
- Did your name change during the tax year?
If "Yes," explain. _____
- If your filing status is married, but you are filing separately from your spouse, did you and your spouse live apart for the last six months of 2025?
- Did your address change during the year?
- Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?
If "Yes," provide Notice CP01A from the IRS.

What is your Occupation? _____

Spouse's Occupation? _____

Provide proof of identity to be eligible to e-file your tax return (DRIVER'S LICENSE or state-issued photo ID)

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?
If "Yes", provide name, address, provider's EIN # and total paid
- Did you have any children under age 18 or a full-time student under age 24 with more than \$2,700 of unearned income? (Example: interest, dividends, 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?
- NJ Residents Only:** Were all individuals on the return covered by a qualified health insurance plan for all 12 months of the tax year?

Income, Purchases, Sales, and Debt Information

Yes No

- Did you start a new business or purchase any rental property during the year?
- Did you sell an existing business, rental property, or other property during the year?
- Did you purchase any business assets or convert any assets to business use?
If "Yes," provide the cost of the asset, the date it was placed in service, and the business use percentage.
- Did you sell a principal residence during the year?
If "Yes," provide closing documentation for the purchase and sale of the home.
- Did you have a principal residence or a piece of real property foreclosed on during the year?
- 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?

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- Did you sell, exchange, or purchase any real estate during the year?
- Did you acquire a new or additional interest in a partnership or S corporation?
- 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).
- Did you receive income or incur expenses associated with a short-term rental (e.g., Airbnb, VRBO)?
If "Yes," provide documentation.
- Did you receive income or incur expenses as an independent contractor (e.g., Shipt, Instacart, DoorDash)?
If "Yes," provide documentation.
- Did you receive any other income you have not provided information for with this organizer?
If "Yes," explain. _____

Itemized Deduction Information

Yes No

- Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) during the year?
- 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 donate a boat or vehicle during the year?
If "Yes," attach Form 1098-C.
- 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?

Education Information

Yes No

- Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)?
- Did anyone in your household attend a post-secondary school during the year?
- Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year?
- Did you pay student loan interest for yourself, your spouse, or your dependents during the year?
If "Yes," provide the amount of interest that was refunded.
- Did you receive forgiveness on a qualifying federal student loan?
- Did any dependents attend a K-12 private school or religious school and you have a 529 plan?

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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?
- Did you have ownership in a foreign corporation at any time during the year?
- Did you own property in a foreign country?

Refund, Withholding, and Estimated Tax Information

Yes No

- If you have an overpayment of 2025 taxes, do you want the refund applied to your 2026 estimated taxes?
- Did you make any estimated payments toward your 2025 taxes?
If "Yes", provide payment dates and federal and state amounts.
- Did you apply an overpayment of your 2024 taxes to your 2025 estimated taxes?
- Do you want to have any refund directly deposited to your bank account? NOTE: Due to Executive Order 14247, Modernizing Payments to and from America's Banking Account, refunds received by check will be delayed at least six weeks. Direct deposit of refunds is recommended.
If "Yes," provide a canceled checking or savings slip.
- Do you want to have any payment due directly withdrawn from your account?
If "Yes," provide a canceled checking or savings slip.
- Do you anticipate your income or withholdings to be different for 2026?

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 finance the purchase of a new passenger vehicle for personal use during 2025?
If "Yes," are the following true:
 - The final assembly was in the U.S.?
 - The gross vehicle weight is under 14,000 pounds?
 - The vehicle was not purchased with a lease?
 - The vehicle was used to secure the loan?

NOTE: If all boxes are marked "Yes", please complete Part IV, lines 18-26 of Schedule 1A

- If you have a dependent born during 2025, do you want to establish a Trump Account?
Yes No
 If "Yes," do you want to receive a \$1,000 pilot program contribution?

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 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?
If "Yes," provide invoice and Qualified Manufacturer Identification Number of Equipment
- Would you like paper copies of your tax return(s) at an additional \$10.00 Fee?

Phone Number _____ E-mail Address _____

Signature _____ Date _____