



INDIVIDUAL QUESTIONNAIRE

Date: _____

Taxpayer Name: _____

Spouse Name: _____

Personal Information

Yes	No
<input type="radio"/>	<input type="radio"/>

Did your marital status change during 2025?

Did your address change from last year?

Can you be claimed as a dependent by another taxpayer?

Did you change any bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority?

Did you receive an Identity Protection PIN (IP PIN) from the IRS, or have you been a victim of identity theft?
If yes, please provide a copy of the IRS letter for filing returns in 2025.

Dependent Information

<input type="radio"/>	<input type="radio"/>

Were there any changes in dependents during 2025?

Do you have any children under the age 19 or a full-time student under the age of 24 with unearned income more than \$2,600?

Do you have dependents who must file a tax return?
If yes, will they need our assistance to prepare?

Did you provide over half the support for any other person(s) other than your dependent children during the year?

Did you pay for childcare while you worked, looked for work, or while a full-time student?

Is there any other person(s) who lived with you more than half the year, but not claimed by you last year?

Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS or have they been a victim of identity theft?

If yes, please provide a copy of the IRS letter for filing returns in 2025.

Purchases, Sales, and Debt Information

<input type="radio"/>	<input type="radio"/>

Did you start a new business or purchase rental property during the year?

Did you sell, exchange, or purchase any assets used in your Schedule C and/or business Schedule E rental activity?

Did you acquire a new or additional interest in a partnership or S corporation?

Did you sell, exchange, or purchase any real estate during the year?
If yes, please provide copies of the closing statements.

Question	Yes	No
Did you purchase or sell a principal residence during the year? If yes, please provide copies of the closing statements.	<input type="radio"/>	<input checked="" type="radio"/>
Did you foreclose or abandon a principal residence or real property during the year?	<input type="radio"/>	<input checked="" type="radio"/>
Did you acquire or dispose of any stock during the year?	<input type="radio"/>	<input checked="" type="radio"/>
Did you take out a home equity loan this year?	<input type="radio"/>	<input checked="" type="radio"/>
Did you refinance a principal residence or second home this year? If yes, please provide copies of the closing statements.	<input type="radio"/>	<input checked="" type="radio"/>
Did you sell an existing business, rental, or other property this year?	<input type="radio"/>	<input checked="" type="radio"/>
Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan(s)?	<input type="radio"/>	<input checked="" type="radio"/>
Did you purchase a new or previously-owned electric vehicle this year that is eligible for the Clean Vehicle credit? If yes, please provide the vehicle statement from the dealer.	<input type="radio"/>	<input checked="" type="radio"/>

Income Information

Did you have any foreign income or pay any foreign taxes during the year not already included on a consolidated 1099 form?

Did you receive any unemployment benefits during the year?

Did you receive any disability income during the year?

Did any of your life insurance policies mature, or did you surrender any policies?

Did you receive any awards, prizes, hobby income, or lottery winnings?

Did you receive any gambling winnings? If yes, please provide your gambling income and loss information.

Did you receive a Form 1099-K, 1099-MISC, 1099-NEC, or other income statement?

Did you have any sales or other exchanges of digital assets (including an airdrop or a hard fork), or used digital assets to pay for goods or services?

Did you receive any tip income in 2025?

Did you receive any overtime pay in 2025?

Do you expect a large fluctuation in income, deductions, or withholding next year?

Retirement Information

Are you an active participant in a pension or retirement plan?

Did you receive any Social Security benefits during the year?

Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?

If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2025?

Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan?

Did you receive retirement distributions from a federal pension?

Yes	No
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Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, or other qualified retirement plan not listed on your W-2?

If over the age of 70 ½, did you make any qualified charitable distributions (QCD) during the year?

Education Information

Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend in the coming year?

Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? If yes, please provide form 1098-T.

Did anyone in your family receive a scholarship of any kind during the year?

If yes, were any of the scholarships funds used for expenses other than tuition, such as room and board?

Did you make any withdrawals from an education savings or 529 Plan account?

If yes, please provide Form 1099-Q.

If you made withdrawals from an education savings or 529 Plan account, were they used for qualified education expenses?

Did you make any contributions to an education savings or 529 Plan account?

Did you pay any student loan interest this year?

Did you cash any Series EE or Series I U.S. Savings bonds issued after 1989?

Health Care Information

Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for your family?

Did you enroll for lower-cost, Marketplace coverage through healthcare.gov under the Affordable Care Act? If yes, please provide form 1095-A.

Did you make any contributions to a Health Savings Account (HSA), or Archer MSA?

If yes, please provide Form 5498-SA.

Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA this year?

If yes, please provide form 1099-SA.

If you received distributions from a Health Savings Account (HSA), or Archer MSA, were they used for qualified medical expenses?

Did you pay long-term care premiums for yourself or your family?

Itemized Deductions

Did you incur a casualty or theft loss or any condemnation awards during the year in a federally-declared disaster area?

Did you purchase or finance a new, personal-use vehicle in 2025?

Did you incur interest expenses associated with any investment accounts you held?

Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)? If yes, do you believe the expenses were more than 7.5% of your adjusted gross income?

Yes No

Did you make any cash charitable contributions?

Did you make any non-cash charitable contributions (clothes, furniture, etc.)?

Did you pay real estate taxes for your primary home and/or second home?

Did you pay any mortgage interest on an existing home loan?

Miscellaneous Information

Did you make gifts of more than \$18,000 to any individual?

Did you utilize an area of your home for business purposes?

Did you engage in any bartering transactions?

Did you retire or change jobs this year?

Did you pay any individual as a household employee during the year?

Did you make energy-efficient improvements to your main home this year? If yes, please provide additional information.

Did you receive a distribution form, or were you granted or transferor for a foreign trust?

Did you have a financial interest in, or signature authority over, a financial account such as a bank account, securities account, or brokerage account located in a foreign country?

Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?

Did you receive correspondence from the State or the IRS?

If you have a Schedule C business and/or Schedule E rental activity, were you required to file any forms 1099, and if so, did you? 1099s are typically required if you paid more than \$600 to pay any non-incorporated entity.

Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?

Do you want to designate \$3 to the Presidential Election Campaign Fund?

If you check yes, it will not change your tax or reduce your refund.

Comments: