



INDIVIDUAL QUESTIONNAIRE

Date: _____

Taxpayer Name: _____

Spouse Name: _____

Personal Information

Yes No

Did your marital status change during 2025?

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Did your address change from last year?

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Can you be claimed as a dependent by another taxpayer?

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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?

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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

Were there any changes in dependents during 2025?

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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?

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

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☐ ☐

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

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

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

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

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

Purchases, Sales, and Debt Information

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

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

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

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

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Did you purchase or sell a principal residence during the year?
If yes, please provide copies of the closing statements.

Yes No
☐ ☐

Did you foreclose or abandon a principal residence or real property during the year?

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Did you acquire or dispose of any stock during the year?

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Did you take out a home equity loan this year?

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Did you refinance a principal residence or second home this year?
If yes, please provide copies of the closing statements.

☐ ☐

Did you sell an existing business, rental, or other property this year?

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Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan(s)?

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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.

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Income Information

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

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Did you receive any unemployment benefits during the year?

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Did you receive any disability income during the year?

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

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

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

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

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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?

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Did you receive any tip income in 2025?

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Did you receive any overtime pay in 2025?

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

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Retirement Information

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

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Did you receive any Social Security benefits during the year?

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

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

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

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Did you receive retirement distributions from a federal pension?

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Yes No

Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, or other qualified retirement plan not listed on your W-2?

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

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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?

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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.

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

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

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Did you make any withdrawals from an education savings or 529 Plan account? If yes, please provide Form 1099-Q.

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

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

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Did you pay any student loan interest this year?

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

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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?

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

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Did you make any contributions to a Health Savings Account (HSA), or Archer MSA? If yes, please provide Form 5498-SA.

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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.

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

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

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Itemized Deductions

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

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

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

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Yes No

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?

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Did you make any cash charitable contributions?

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

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

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

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Miscellaneous Information

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

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

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Did you engage in any bartering transactions?

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Did you retire or change jobs this year?

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

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

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

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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?

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

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Did you receive correspondence from the State or the IRS?

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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.

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

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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.

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Comments: