2025 CLIENT QUESTIONNAIRE

* CHECK ALL THAT APPLY TO YOUR TAX SITUATION

INCOME SOURCE

_ Employer W2's **(Tips?/Overtime? Bring your last paystub)**
_ Unemployment
_ Social Security (SSA-1099)
_ Retirement plan Distribution (1099 R)
_ Interest (1099 INT)
_ Dividends (1099 DIV)
_ Stock or mutual fund sales (1099 B/ Broker statements)
_ Self-employment/ misc. income (1099NEC/1099MISC)
_ Expenses from self-employment
_Rental Property
_K1 (partnership, estate, trust income)

MEDICAL PREMIUMS

_ ***Medical premiums out of pocket***
_ ***Long term care insurance***

ITEMIZATIONS

_ Donated cash/goods to a charity
_Paid Sales tax on a large purchase (car/ truck, etc.)
_ Mortgage (1098)
_ Property tax
_ Large out of pocket medical expenses

HOUSEHOLD/DEPENDENT

_ Changed marital or family status
_ Adopted a child
_ Had a new baby (Need SSA #)
_ Paid child/dependent care expenses
_ Paid Tuition (1098 T) and education expenses
_ Paid Student loan interest
_ **Enrolled in a health insurance plan through the Federal or State MARKETPLACE (1095 A)**
_ HSA contribution/distribution

MISCELLANEOUS

_ Sold a home
_ Paid/received Alimony Divorce date: _____
_ Had gambling wins/losses (W2G and will also need Win/Loss statement from Casino.)
_ Made an IRA (**SELF**) contribution
_**Received an IRS issued PIN #**
_ Made estimated payments
_ Had any cancellation of debt/foreclosure/ bankruptcy (1099 C)
_***NEW Car loan interest(need title)***

Do not leave these questions unanswered. The IRS requires every taxpayer to answer "Yes" or "No" on Form 1040.

1. At any time during the tax year, **did you or your spouse:** a) receive (as a reward, award, or payment property or services); or b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

YES NO

2. At any time during the tax year, did your **dependent:** a) receive (as a reward, award, or payment for property or services); or b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

YES NO

3. Did you have any interest/ signature authority over any foreign account or foreign trust?

YES NO

SIGNATURE: