

# 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 MARKET-PLACE (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 **depend-**  
**ent:** 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:**