

## 2025 CLIENT QUESTIONNAIRE

Client Name:	Date:
Email:	Phone:
COMPLETE THIS SECTION <b>ONLY</b> IF YOU HAVE A <b>NEW</b> ADDRESS OR PHONE	
NEW Address:	NEW Phone:
	Date of Move:
DIRECT DEPOSIT INFORMATION	
Is the account a <b>CHECKING</b> or <b>SAVINGS</b> account? ( <i>CIRCLE ONE</i> )	
Routing Number:	Account Number:
PLEASE ANSWER THE FOLLOWING QUESTIONS. <b>CIRCLE YES OR NO AND PROVIDE DOCUMENTATION IF NEEDED.</b>	
1. Are you claiming the same <b>dependent(s)</b> as last year?	YES / NO
2. Do you have a <b>Business/LLC/Rental</b> ?	YES / NO
3. Do you have any <b>miscellaneous income</b> ? ( <i>Gambling, UBER, Airbnb, Online, etc.</i> ) <b>If yes, provide 1099-Misc, 1099-NEC or 1099-K (see enclosed client letter for details on 1099-K).</b>	YES / NO
4. Do you have any <b>energy efficient</b> home improvements or did you purchase an electric vehicle this year? <b>If yes, provide details.</b>	YES / NO
5. Have you <i>or your dependents</i> received/sold/exchanged any form of <b>crypto currency</b> ?	YES / NO
6. Does anyone in your household have health insurance through the <b>Government Marketplace</b> ? <b>If yes, provide form 1095-A.</b>	YES / NO
7. Do you have accounts that you are authorized to draw from that are held in a <b>foreign bank account</b> ?	YES / NO
8. Are you the beneficiary or executor for any <b>trusts or estates</b> this year?	YES / NO
9. Did you have time off of work or receive <b>unemployment</b> this year? <b>If yes, provide your unemployment 1099.</b>	YES / NO
10. Are you divorced and paying/receiving <b>alimony</b> ? <b>If yes, provide the date of your alimony decree:</b>	YES / NO
11. Did you have any <b>debt forgiven</b> this year ( <i>loans, credit cards, home, etc.</i> )? <i>Note: forgiven is different than paid off.</i>	YES / NO
12. Did you make any contributions or distributions to or from a <b>529 plan</b> ( <i>college savings</i> )? <b>If yes, provide statements.</b>	YES / NO
13. Did you pay tuition for college <b>education</b> ? <b>If yes, provide form 1098-T and college financial transcript.</b>	YES / NO
14. Did you donate to any <b>charity</b> ? <b>If yes, provide documentation or a summary.</b>	YES / NO
15. Did you make contributions to or withdrawals from a <b>non-payroll IRA</b> this year? <b>If yes, was it a Traditional or a Roth (circle one).</b>	YES / NO
16. Did you <b>start</b> receiving Social Security in <b>2025</b> ?	YES / NO
17. Do you have a <b>Health Savings Account</b> ( <i>not a flexible spending account</i> )? <b>If yes, provide amount in/out and balance as of 12/31/2025.</b>	YES / NO
18. Do you have <b>daycare</b> expenses for kids under age 13 or disabled? <b>If yes, provide name, address, and tax ID number of provider.</b>	YES / NO
19. Did you make <b>estimated tax payments</b> for 2025 ( <i>IRS/State/City/School District</i> )? <b>If yes, provide check(s) amount and date(s) paid.</b>	YES / NO

REMINDER THAT IF YOU HAVE ANY **TAX CREDITS** OR FILE **AS HEAD OF HOUSEHOLD**,  
 WE WILL NEED DOCUMENTATION AS OUTLINED IN THE ATTACHED LETTER.