

# TAX YEAR 2025

Name: \_\_\_\_\_

1) What is your marital status? \_\_\_\_\_

2) Are there any changes to your address, email, phone or bank accounts?

Yes

No

If yes, please provide additional information: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3) Are there any changes in dependents?

Yes

No

If yes, please provide additional information: \_\_\_\_\_

4) Did you and/or your spouse have any interest in, or authority over, any foreign account or foreign trust at any time during the current year?

Yes

No

If yes, and **balance was >\$10K**, what was the largest balance in the account during the year? \$ \_\_\_\_\_

5) At any time during 2025, did you and/or your spouse receive (as a reward, award, or payment) or sell, exchange, gift, or otherwise dispose of a digital asset (or any financial interest in a digital asset)?

Yes

No

6) Did anyone in your household attend a post-secondary (college, university, technical) school during the year?

Yes

No

If yes, please provide form 1098-T.

7) Did you purchase, refinance, or sell your primary or a second residence last year?

Yes

No

If yes, please provide settlement statement.

8) Did you purchase a new (not used) car during 2025?

Yes

No

If yes, please provide EOY interest statement.

9) Did you pay for daycare or after school care for your dependents?

Yes

No

If yes, please provide statement.

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10) Did you receive overtime pay?

Yes

No

**If yes, please provide your final paystub of the year.**

11) Did you receive tip income?

Yes

No

12) Did you have Marketplace (Healthcare.gov) health insurance last year?

Yes

No

**If yes, please provide form 1095-A.**

13) Did you receive an IP PIN from the IRS last year?

Yes

No

**If yes, please provide the number:** \_\_\_\_\_

14) Did you make quarterly estimated tax payments?

Yes

No

If so, please provide amounts by quarter for Federal and/or State. \_\_\_\_\_

15) How would you like to receive your tax return client copy?

PDF

Paper

16) If you are providing original documents, how would you like us to return them to you?

Pick up

Mail

Not Applicable

\*The IRS is has begun phasing out paper refund checks, effective September 30, 2025.

Paper refund checks requested this tax season will experience **significant delays**. We strongly recommend choosing direct deposit.