

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.