

INCOME TAX RETURN QUESTIONNAIRE

Client Name _____

Client Name _____

Filing Status and Dependents	Yes	No	Comment
Did your address change?			
Did your marital status change?			
Were there any changes in dependents?			
Are you supporting anyone not living with you?			
If you are separated or divorced, do you have a separation agreement or divorce decree?			
Income – Need tax and back-up documents	Yes	No	Comment
Have you changed employment?			
Has your income changed?			
Do you have self-employment income and expenses?			
Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S corporations?			
Did you receive any disability or unemployment payments?			
Did you receive alimony?			
Did you surrender any U.S. savings bonds?			
Did you have foreign income/gifts?			
Did you buy or sell any stocks, bonds or other investment property?			
At any time during 2025, did you (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)? Need form 1099-DA			
Did you have any cancellation of debt (1099-C)?			
Did you make any withdrawals from an IRA or Pension before age 59 1/2? Need 1099-R			
Did you make any withdrawals from an education savings account or Section 529 plan? Need receipts for expenses and form 1099-Q Did you make any contributions? Need plan statement showing contribution.			
Did you have any jury duty income?			
Retirement – Need tax documents	Yes	No	Comment
Did you or your spouse reach age 73?			
Did you take your Required Minimum Distributions (RMD), if applicable?			
Did you or your spouse receive Social Security benefits? Need form SSA-1099			
Did you or your spouse receive any 1099-Rs, Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.?			

Retirement (continued) – Need tax documents	Yes	No	Comment
Did you convert part or all of your regular IRA/SEP/SIMPLE IRA into a Roth IRA? Need documents.			
Have you or do you plan on contributing to a Traditional IRA, Roth IRA, SEP, Keogh or SIMPLE plan?			
Itemized deductions – Need receipts	Yes	No	Comment
Did you pay out-of-pocket medical expenses (co-pays prescriptions, braces, hearing aids, etc.)? You need to retain receipts; we can use totals.			
Did you take out a Mortgage interest or home equity loan this year? Need form 1098.			
Did you purchase, sell, or refinance your principal home or second home? We need closing statements.			
Do you have any charitable contributions? Need receipts.			
Did you pay real estate taxes?			
Do you have any medical or charity mileage?			
Did you have any property damaged due to a storm, fire??			
Tax Credits – Need receipts	Yes	No	Comment
Did you have any energy efficient home improvements in 2025? Examples include exterior doors, exterior windows and skylights, insulation and air sealing materials or systems, central air conditioners, natural gas, propane, oil water heaters, oil furnaces, heat pumps, etc. Need receipts.			
Did you purchase a new, qualified plug-in EV or fuel cell electric vehicle (FCV) prior to September 30, 2025? Need invoice.			
Miscellaneous – Need receipts	Yes	No	Comment
Did you make any estimated federal or state tax payments towards your income tax?			
Were you a resident of (or did you have income in) more than one state?			
Are you or any dependents in college? Need 1098-T and student accounts print out for the year from the college.			
Do you have any daycare costs for your dependents? Need receipts for payments made, provider’s name, address, and ID number.			
Did you pay interest on a new personal car loan? Need copy of purchase invoice with vehicle year, make, model, and VIN number, total interest paid, principal balance as of January 1, 2025, and loan origination date.			
Did you give a gift of more than \$19,000 to one or more people?			
Are you enrolled in health insurance through the Marketplace? Need form 1095-A			
Did you make purchases of taxable property or services outside of NYS? Were those purchases or services used in NYS?			

NOTES

Tax on Tips Deductions:

Employee Tips **will** be reported on your W-2.
We will need your final paystub for 2025.
There are income phase out rules.
Married individuals must file jointly to claim.

No Tax on Overtime-Deduction:

Overtime will be reported on your W-2.
We will need your final paystub for 2025.
There are income phase out rules.
Married individuals must file jointly to claim.

Additional \$6,000 deduction for taxpayers over 65:

There are income phase out rules.
Married individuals must file jointly to claim.

New form for Digital Asset sales – 1099-DA:

We will need form 1099-DA

Trump Accounts:

Child must be born in 2025.
Need copy of SS card.

New-IRS is phasing out paper refund checks.

Please provide bank account information for all refunds.

Any other information? Please provide.