

Please answer all questions

CIRCLE ONE

11. Have you bought, sold, or had your Home foreclosed on in 2025? Yes or No
12. Have you had any Cancellation of Debt in 2025? (provide the form 1099-C)
(Such as credit cards, auto loans, forgiveness of debt, repossession, etc.) Yes or No
13. Have you made any Energy Efficient improvements to your personal residence in 2025?
(Such as Solar, Geothermal, Window, HVAC, Doors, Gas Hot Water Heater, etc. provide documents) Yes or No
14. Did you make any OUT OF STATE purchases (by phone, internet websites, mail order, etc.)
that the seller DID NOT collect sales or use tax on in 2025? (If so, provide cost of purchases). Yes or No
15. Did you sell Stock, Timber, Real Estate or any Digital assets in 2025?
(If so, please provide sale information, 1099's or HUD statement from sale) Yes or No
16. Did you receive Social Security benefits in 2025?
(if yes, please provide your 1099-SSA form) Yes or No
17. Did you receive any lottery winnings, jury duty pay or alimony in 2025? Yes or No
18. Do you or your spouse have any Foreign Bank Accounts or Trusts? Yes or No
19. Have you bought a new personal vehicle in 2025, that had final assembly in the USA?
(Please Provide VIN number and Interest Paid) Yes or No
20. At any time during 2025, did you receive (as a reward, award, or payment) or sell, exchange,
gift, or dispose of any DIGITAL ASSETS? (If so, please provide documentation.) Yes or No
(EX: Bitcoin, Dogecoin, Ethereum, or through brokers such as Robinhood, Coinbase, Cash App, PayPal, etc.,
they should issue you a year end statement) (1099-DA)
21. Were you paid Tips or Overtime in 2025? (Please provide the documentation from your employer) Yes or No
22. For the year 2025 did you have health insurance for you and your family
With the Affordable Care Act also known as Healthcare.gov (1095-A Form is required) Yes or No
23. DIRECT DEPOSIT is now required for any federal refunds. (EX: Cash App, Venmo etc.)
(Please provide your direct deposit, bank name, routing number and account number information WITH your tax documents.)

Bank Name: _____ Routing Number: _____ Account Number: _____

24. Would you prefer to receive a copy of your completed tax return by _____ Electronic or a Paper Copy

Please note in the section below any other items you would like to discuss with your tax preparer:

NOTES:-----

Our fees are based on the size, complication and forms on your tax return. These fees cannot be accurately determined until the completion of the return. However, if price is a concern, please ask the preparer for a cost estimate prior to the start of your return. The estimate will be within 10% of the final fee. **Once the return is started you will be responsible for the fee.**

Please sign and date:

Taxpayer: _____ Date: _____

Spouse: _____ Date: _____