

2025
TAX QUESTIONS

(Please complete and return this form with your tax information)

Name: _____

Cell # _____

Cell # _____

Home# _____

Work# _____

Circle one

- Yes or No** **Do you own any assets (land, bank accounts, etc.) in a Foreign Country or Foreign Bank, OR receive any funds or gifts from a Foreign Person or Country?**
- Yes or No** **Did you buy/sell/trade any CRYPTO currency such as Bitcoin?**
- Yes or No** **Did you begin or end a business/farm/or investment in a LLC or S-Corp?**
- Yes or No Did your address change since the last tax return?
- Yes or No Did your marital status change during the year?
- Yes or No Were any children born or adopted this year?
- Yes or No Did any children start college **or** move out of your household this year?
- Yes or No Did any parents live with you or did you provide financial support for them during the year?
- Yes or No Is anyone in the family totally disabled? If so, do they receive disability income?
- Yes or No Did you receive an inheritance, alimony, jury duty, or lottery winnings?
- Yes or No Were any stocks, bonds, or other investment property sold during the year?
- Yes or No Did you purchase, sell or refinance any real estate this year (*settlement sheet needed*)?
- Yes or No Did you receive a distribution from a 401(K), profit-sharing plan, retirement plan, or individual retirement account (including Traditional, Roth, and Education IRAs)?
- Yes or No Did you convert from or contribute to a Traditional, Roth, Regular or Education 529 Plan?
- Yes or No Did you contribute to a Health Savings Account (HSA)?
- Yes or No Was your home rented out or used for business during the year?
- Yes or No Did you add energy efficient improvements to your home this year (*Receipts are needed*)?
- Yes or No Were any gifts made to an individual or trust that totals more than \$19,000 for the year?
- Yes or No Did any children have investment (interest, dividends, etc.) income more than \$1,350?
- Yes or No Were you notified or audited by either the Internal Revenue Service or a State taxing agency?

(Please See Other Side)

2025 TAX FORMS AND INFORMATION NEEDED

- ✓ **New:** W-2's from all Employers **AND** if you worked overtime, the final paystub of the year
- ✓ **New: 1099-DA for the sale of Digital Assets**
- ✓ **1095A from the Health Insurance Exchange**
- ✓ 1099-INT, 1099-DIV, 1099-R, 1099-SSA, 1099-S, 1099-K, 1099-NEC and/or 1099-MISC's
- ✓ 1099-B and Cost Basis for each stock/bond sale.
- ✓ **1098-T AND proof of payment and receipts for books, tuition, and required fees paid for college.**
- ✓ 1098-E and/or statement of student loan interest paid.
- ✓ 1098's for mortgage interest and real estate taxes paid *or real estate bill for non-escrow accounts.*
- ✓ **Settlement sheets (HUD-1 Forms) from the purchase, sale, or refinance of any real estate.**
- ✓ List of unreimbursed medical expenses including, doctor, dentist, hospital, nursing homes, prescriptions, hearing aids, eye care, medical supplies, medical miles driven, and health and long term care insurance premiums.
- ✓ Summary of charitable donations **for which there are receipts**, and charitable miles driven.
- ✓ *Statement from Child Care Provider including the amount paid, name, address and tax ID# or Social Security Number of the provider.*
- ✓ Listing of unreimbursed teaching/education supplies.
- ✓ Miles driven for business/rental (**NOT** including to and from work) vehicle make and model _____
 Total Miles for 2025 _____ Business Miles for 2025 _____.
- ✓ **2025 Estimated Tax Payments made:**

| Federal | | Due Date | State | |
|-----------------|----------|-----------------|-----------------|----------|
| Date Paid _____ | \$ _____ | 4/15/25 | Date Paid _____ | \$ _____ |
| Date Paid _____ | \$ _____ | 6/15/25 | Date Paid _____ | \$ _____ |
| Date Paid _____ | \$ _____ | 9/15/25 | Date Paid _____ | \$ _____ |
| Date Paid _____ | \$ _____ | 1/15/26 | Date Paid _____ | \$ _____ |

Notes: