

TAX QUESTIONNAIRE

NOTE: Include this completed and SIGNED form with all of your Tax Documents

Full Name Taxpayer: _____	Date of Birth DOB: _____	Occupation: _____
Spouse: _____	DOB: _____	Occupation: _____
Taxpayer Phone # : _____		Taxpayer email: _____
Spouse Phone # : _____		Spouse email: _____

Dependent(s) - List any NEW Dependents - (attach additional sheets if needed)			
Full Name	Social Security #	Date of Birth	Relationship (Son/Daughter)

“X” YES or NO below for each question and provide additional information where requested (attach additional sheets as needed)

YES NO → In 2025 Did You (and / or your Spouse if married)?:

- 1) [] [] Change your address during the year? *If yes*, enter Date Moved _____ and list new address below: _____
- 2) [] [] Maintain any money in any **Foreign Bank Account** or Own any property located **Outside of the United States?**
- 3) [] [] Own any **Digital Currency** such as Bitcoin/Dogecoin/Other? (whether you sold it or not)
- 4) [] [] Have **Health coverage?** (including for your spouse, and all dependents *if applicable*)
- 5) [] [] Renew your Driver’s License? *If yes*, send a copy of the **Front & Back** of each renewed license
- 6) [] [] Pay for **Childcare?** *If yes*, complete the information requested in the **section on Back** →
- 7) [] [] Pay any **student loan interest?** ----- *If yes*, include a copy of Form **1098-E** for each student.
- 8) [] [] Pay **Tuition** for anyone attending college? ----- *If yes*, include a copy of **Form 1098-T** and list below any amounts \$-----
Paid for Books: \$ _____
- 9) [] [] Make any **monetary \$ donations** which you have a receipt for? *If yes*, complete the appropriate **section on Back** →
- 10) [] [] Make any **non-monetary donations** (clothes, furniture, other property) to a charity which you have a receipt for?

If yes, and the total fair market value donated was **under \$500** enter the *total value of all items here*: \$ _____
If yes, and total value donated was **over \$500** complete the appropriate **section on Back** →
- 11) [] [] Have any **job-related** expenses -not reimbursed by your employer? (*K-12 Teachers include classroom supplies*)
If yes, list in the “Addl Info” section on back →
- 12) [] [] Pay any **Sales Tax** on large items purchased? (Large Appliances / Car / Boat) -> *If yes*, include a copy of all receipt(s)
- 13) [] [] Pay **Rent** or **Property Tax?** *If yes*, list amount paid for **Rent** \$ _____ **Property Tax** \$ _____
- 14) [] [] Receive **Unemployment** payments? *If yes*, include a copy of **Form 1099-G**.
- 15) [] [] Contribute any money to a **529 College Savings plan?** *If yes*, include a copy of the end of year statement
- 16) [] [] Deposit money into an **IRA** (*other than your employer plan*)? *If yes*, include a copy of the end of year statement
- 17) [] [] Withdraw money from 401K or any other retirement plan)? *If yes*, include a copy of **Form 1099R**
- 18) [] [] Pay out of pocket for **Health ins./Long Term Care/medical/dental expenses?** - *If yes*, list in “Addl Info” section on back →
- 19) [] [] Receive a **1099-K form** or receive money for non-personal transactions? (Venmo – PayPal – eBay - Cash App - Other)
-> *If yes*, include 1099K Form and/or attach a list detailing **income and any expenses incurred**.
- 20) [] [] Make any **Energy-Efficient improvements** to your main home? (Solar / New Furnace /Central AC/HW Heater – New Windows/Doors / Insulation / home energy audits) *If yes*, include a copy of all receipt(s)

Yes No → **In 2025 Did You (and / or your Spouse if married)?:**

21) [] [] Gift anyone more than 19,000 in money or property? - **If yes, explain in "Addl Info" section Below**

22) [] [] Make any **Estimated Tax payments?** - **If yes, attach copies of proof of estimated payments made and dates paid.**

23) [] [] Receive a **New York State Inflation Reduction Check?** **If yes, enter the check amount here:** \$ _____

24) [] [] Receive any **Overtime pay** or **Tips?** **If yes, include a copy of your end-of-year paystub. (final paystub)**

25) [] [] Receive any **Property Tax Rebate?** **If yes, enter amt of "NY STAR" \$ _____ "NJ Anchor" \$ _____ Other \$ _____**

➤ **LIST CHILD-CARE EXPENSES below- All information is required to qualify for the credit - ATTACH ADDITIONAL SHEETS IF NEEDED**

Childs Name	Name of Provider	Address of Provider	ID number of Provider	Amount Paid

➤ **LIST Monetary \$ Donations to Charities below -Note: Proof of all donations is required -ATTACH ADDITIONAL SHEETS IF NEEDED**

Name of Charity	Amount	Name of Charity	Amount

➤ **LIST NON-Monetary donations below (ATTACH ADDITIONAL SHEETS IF NEEDED)- Include any Receipts/Statements from each Charity**

Name of Charity	Item(s) donated	Date Donated	Original cost \$	Market Value \$ when donated

➤ **Additional information (ATTACH ADDITIONAL SHEETS IF NEEDED)**

If you are due a Tax Refund and would like it to be direct deposited - Complete the information below :

[] Checking [] Savings - Bank Name _____

Routing # _____

Account # _____

If you have an IRS Identity PIN - Enter it below:

Taxpayer # _____ Spouse # _____

Dependent Name _____ # _____

SIGN X _____

**Send this SIGNED form
with your Tax Documents**