

2025 Tax Year (Complete Name Above)

YES NO or N/A

Administrative Questions

- Did you move to a new locations (home address change, move to a new state, etc.)?		
- Do you own or lease a secondary residence in a state other than the state where your primary residence is located? If so, further discussion may be required to determine if there are any tax implications with the other state. This also applies to you if your secondary residence is in NYC and your primary residence is outside of NYC.		
- Did you make any estimated income tax payments? If so, please provide the agency you paid (IRS or a specific state), date paid & amount paid.		
- Did your marital status change during the year?		

YES NO or N/A

Dependent Questions

- Were there any changes to your dependents; any new dependents or any that should be removed? If new, did you pay any qualified adoption expenses? If you had a new child during the year, you may be eligible to open a Tump Account and receive a pilot program contribution of \$1,000.		
- Did you pay any child and dependent care expenses? Day Camp, Afterschool, Nursery, and pre-kindergarten payments qualify. If so, please provide the name, address, taxpayer identification number and amount paid for each provider. If married filing join, both spouses would need to have earned income to qualify for this credit.		

YES NO or N/A

Investment Income

- Did you open and/or close any new bank or brokerage accounts?		
- Did you exercise any stock options?		

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YES NO or N/A

Investment Income (continued)

- At any time during 2025, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset) (i.e. Bitcoin, Ethereum, etc.)? If so, we will need to discuss further to determine any potential tax reporting that may be required.

- Do you own any investments which were deemed worthless as of 12/31/2025 which we can write off?

YES NO or N/A

Retirement Plans

- Did you receive any IRA/pension distributions? If so, were any funds rolled over to another qualified retirement plan within 60 days?

- If you are over 70 ½, plan to make charitable contributions and will be taking distributions from your IRA/pension accounts, please let us know if you are interested in learning more about Qualified Charitable Distributions and their potential tax savings.

- If you qualify, are you interested in making an IRA or retirement plan contribution? There could be several options available including deductible, non-deductible, Roth and “backdoor Roth” IRA options.

- If you currently have Traditional IRA accounts, have you considered converting your Traditional IRA(s) into a Roth IRA?

- If you have a solo 401k (aka self-employed 401k or an individual 401k) have the plan assets exceeded \$250,000? If so, you are required to file a Form 5500-EZ.

If you are 73 years old please be mindful of RMD's (Required Minimum Distributions) for your retirement accounts.

If you are between the ages of 60-63 by the end of the year, you may be eligible for additional retirement catch-up contributions. Please let us know if you would like to know more.

Please note that beginning in 2026 if you are considered a highly compensated employee (HCE), your 401K age 50+ catchup contributions will need to be Roth (after-tax) contributions.

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Other Income

- Did you earn wages from a new employer?		
- Did you receive unemployment compensation?		
- Did you receive any social security/disability benefits during the year?		
- Did you receive Form 1099-K for payments received through Venmo, PayPal, CashApp, etc.? If yes, please send to us and let us know what the payments were for, as that will determine taxability.		
- Did you receive any other income such as alimony, tips, executor commissions, jury duty pay, gambling income? If any gambling income, please provide any gambling losses as well.		

YES NO or N/A

Itemized Deductions

- Did you pay any major medical expenses (more than 7.5% of your total income)?		
- Did you pay any long-term care insurance premiums?		
- Did you pay any real estate taxes?		
- Did you pay any state personal property taxes (not real estate taxes) on any assets you own such as cars, boats etc.?		
- Did you make any charitable contributions, either cash or non-cash? Have you considered donating appreciated stock? We estimated your charitable contributions to be in line with last year. Please advise if we need to adjust.		
- Did you have any casualty, theft, or property losses?		
- Did you pay any investment management or investment related expenses?		
- Did you pay any safe deposit box fees?		
- Did you pay any unreimbursed job expenses?		

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YES NO or N/A

Health Insurance

- Did you make any contributions to a Health Savings Account (HSA)?		
- Did you receive any distributions (or make any payments) from a Health Savings Account (HSA)?		
- Did you purchase Medical Insurance through the Federal or a State Marketplace? If so, did you receive an advance premium tax credit reducing your insurance premiums?		

YES NO or N/A

Other Tax Credits & Deductions

- Did you pay any car loan interest on a new vehicle purchased during the year for which final assembly occurred in the US? Depending on your income level, you may be eligible to receive a potential deduction.		
- Did you receive any overtime pay from your employer? Depending on your income level, you may be eligible to receive a potential deduction.		
- Did you receive any tip income during the year from an occupation that customarily and regularly receives tip income. For example, a waiter, hair stylist etc.. Depending on your income level, you may be eligible to receive a potential deduction.		
- Did you pay any education expenses for yourself, spouse or dependents? If so, please provide Form 1098-T if available.		
- Did you pay any student loan interest during the year? If so, please provide Form 1098-E.		
- Did you make any alimony payments during the year attributable to an alimony agreement executed by 12/31/2017 or prior?		
- Did you pay any educator expenses out of pocket?		
- Did you incur any energy efficient improvements, such as new windows, insulation or exterior doors that meet the Energy Star requirements, costs related to solar panels, water heaters, geothermal heat pumps, small wind energy, qualified battery storage technology, qualified fuel cell property or pay for any solar electric in your home?		

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YES NO or N/A

Other Tax Credits & Deductions (Continued)

- Did you purchase an electric motor vehicle before October 1, 2025? If so, please provide further information if the credit was not already taken into account on the purchase price of the vehicle at the point of sale		
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YES NO or N/A

FOREIGN QUESTIONS

- At any time during the year, did you have a financial interest in or signature authority over a foreign financial account (such as a bank account, securities account, or brokerage account) or any assets located in a foreign country? If so, did the aggregate value of all foreign accounts exceed \$10,000 at any point during the calendar year?		
- Did you have any ownership in a foreign entity?		
- Did you receive a significant gift from a foreign party during the year? If so, what was the dollar amount?		
- Did you receive any income from foreign sources, not reported on a 1099? If so, were foreign taxes paid/withheld?		
- Did you receive a distribution from, or were you a grantor of, or were you the transferor to a foreign trust?		

YES NO or N/A

Gift & Estate Considerations

- Did you make any contributions to a 529 College Savings Program? If so, please let us know the state sponsor of the 529 program and amount funded.		
- Did you make gifts to any one party (including children or any other family member) in excess of \$19,000 (\$38,000 if married)? Tuition and medical expense payments are exempt from Gift Tax rules. If you plan on making future gifts to individuals, consider paying tuition or medical expenses directly in lieu of cash gifts.		

We suggest that you consider having the following prepared / reviewed: Last Will & Testament, guardianship, power-of-attorney forms, and a health care proxy.

We suggest that you review your beneficiary designations across all accounts, including bank accounts, life insurance, IRAs, pensions, annuities, etc.