



# TAX ADVANTAGE

## 2025 Tax Return Questionnaire

**Only** fill out info below other than name and date if there have been changes from last year:

Date:

Phone Number:

Name: \_\_\_\_\_

Email Address:

Address:

City, State & Zip:

**Occupation:**

Do you have an appointment? Yes or No    If yes list date:

If you **answer YES to any of these questions** on this sheet, please **provide detailed support** in your documents or list on 2<sup>nd</sup> page.

**List Name, DOB & SSN of all dependents being claimed. If nothing has changed from previous year, please write "No Change" \*Any dependents being claimed by the taxpayer must meet the requirements set forth in Publication 929\***

Did you **work and reside in Florida** the entire 2025 tax year? YES   NO

- If no - List of states worked in during 2025:

Did you have **Marketplace Healthcare**? If YES, please provide **Form 1095A**      YES    NO  
\*\*\*Previously Obama Care\*\*\*

If you are filing **state returns outside of Florida**, please provide a copy of your driver's license.

### Potential itemized deductions:

- Did you make any energy efficient improvements? (*Windows, doors, etc.*) YES NO
- Did you buy or sell a primary residence in 2025? YES NO
- Did you make any large purchases that collected *sales tax*? (*Vehicles, boats, etc.*) YES NO
- Did you make any *charitable contributions*? If so, please provide total. YES NO
- Out of pocket medical expenses above 7.5% of your income – YES NO  
(for example, 50k of annual pay would need to be above 3.5k of uninsured expenses incurred)

During 2025, did you have any of the following?

- Continuing education expenses? (*Tuition, books, supplies, etc.*) YES NO
- 1098T forms? (*College tuition form*) YES NO
- Childcare expenses?

**If yes provide EIN/SSN #, name and address of facility/individual** YES NO

- Retirement contributions outside of employer plans? YES NO
  - Traditional IRA, ROTH IRA etc.
- Withdrawals from any retirement accounts? If so, provide 1099-R. YES NO
- Did you buy, sell, receive or acquire any virtual currency (i.e. crypto) YES NO
  - If you SOLD crypto please provide 1099. If no 1099, provide sales proceeds & cost basis
- Did you purchase a qualified plug-in electric vehicle? YES NO
  - If so, provide the entire bill of sale and the VIN #
- Did you have any foreign income or bank accounts? YES NO
- Did you *finance* a **NEW** 2025 or 2026 vehicle **after** 1/1/2025? YES NO
  - If so, the loan interest expense may be deductible.
- Did you receive an IP PIN # from the IRS for 2025? YES NO
  - If so, please provide it here or with your tax documents. \_\_\_\_\_

If you owned **rental property** in 2025, please fill out our Rental Worksheet found on our website at [www.taxadvantage.org](http://www.taxadvantage.org) under the resources tab.

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During 2025, if you **owned a business** that does not file its own tax return or were self-employed, please fill out our Business Worksheet found on our website at [www.taxadvantage.org](http://www.taxadvantage.org) under the resources tab.

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Did you make any **1040 estimated payments** for 2025? If YES, list *dates and amounts*:

- Q1 date & amount:
- Q2 date & amount:
- Q3 date & amount:
- Q4 date & amount:
- Other date & amount:

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Is your Direct Deposit information the same as last year YES NO

If not please list new **Direct Deposit** information

Account number # \_\_\_\_\_ Routing number # \_\_\_\_\_

***Please make additional notes or questions in the below space that your tax preparer should be aware of.***