



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 2nd 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? (<i>Windows, doors, etc.</i>) | YES | NO |
| • Did you buy or sell a primary residence in 2025? | YES | NO |
| • Did you make any large purchases that collected <i>sales tax</i> ? (<i>Vehicles, boats, etc.</i>) | YES | NO |
| • Did you make any <i>charitable contributions</i> ? If so, please provide total. | YES | NO |
| • Out of pocket medical expenses above 7.5% of your income –
(for example, 50k of annual pay would need to be above 3.5k of uninsured expenses incurred) | YES | NO |

During 2025, did you have any of the following?

- | | | |
|--|-----|----|
| • Continuing education expenses? (<i>Tuition, books, supplies, etc.</i>) | YES | NO |
| • 1098T forms? (<i>College tuition form</i>) | 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 under the resources tab.

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 under the resources tab.

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:
-

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.

PAYMENT IS DUE AT TIME SERVICES ARE RENDERED