

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) <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 33%;">Full Name</th> <th style="width: 33%;">Social Security #</th> <th style="width: 33%;">Date of Birth</th> <th style="width: 33%;">Relationship (Son/Daughter)</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table>			Full Name	Social Security #	Date of Birth	Relationship (Son/Daughter)								
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 _____ #

Save / Download as pdf "with changes" / Print and SIGN &

Send this SIGNED form
with your Tax Documents

By entering my name below, I acknowledge that this constitutes my legal signature-

SIGN X