

# TAX QUESTIONNAIRE

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

|                                     |                                    |                       |
|-------------------------------------|------------------------------------|-----------------------|
| Full Name<br><b>Taxpayer:</b> _____ | Date of Birth<br><b>DOB:</b> _____ | 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 \_\_\_\_\_ # \_\_\_\_\_

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

SIGN X \_\_\_\_\_

**Save / Download as pdf "with changes" / Print and SIGN & Send this SIGNED form with your Tax Documents**