

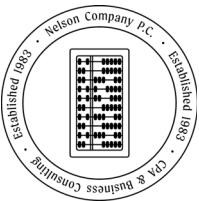
# Thorough but Important Tax Questionnaire

(Help us know what we don't know)

Please answer the following questions and **submit details** for any question answered **"Yes"**:

Yes      No

1. Did any births, adoptions, marriages, divorces, or deaths occur in your family last year? *If yes, provide details, including the final divorce date.* \_\_\_\_\_
2. Will the address on your current returns be different from that shown on your prior year returns? *If yes, provide the new address and date moved in the Details section on page 4.* \_\_\_\_\_
3. Were there any changes in dependents from the prior year? *If yes, provide details.* \_\_\_\_\_
4. Do you share/alternate deductions for dependents due to a divorce decree? *If yes, provide details.* \_\_\_\_\_
5. Did any of your dependents have earned income of \$15,750 or more from a job? Or \$400 if self-employed? \_\_\_\_\_
6. Did any of your children under age 19 (or age 24 if they are a full-time student) have investment income of \$1,300 or more? If yes, do you want to include your child's income on your return? \_\_\_\_\_
7. Are you providing over half the support for any children who are married and filing a joint return with their spouse? \_\_\_\_\_
8. Did any dependent child 19-23 years of age attend school full-time for any part of 5 months during the calendar year? \_\_\_\_\_
9. Did you receive income from any legal proceedings, cancellation of student loans or other indebtedness during the year? *If yes, provide details and applicable forms (1099-C, 1099-A).* \_\_\_\_\_
10. Did you make any gifts during the year exceeding \$19,000 per person? \_\_\_\_\_
11. At any time during 2025, did you:
  - a. Receive any digital assets as a reward, award, or compensation? \_\_\_\_\_
  - b. Sell, exchange, gift, or otherwise dispose of a digital asset? *If yes, please provide details and Form 1099-DA.* \_\_\_\_\_
12. Did you have any interest in, or signature, or other authority over a bank, securities, or other financial account in a foreign country? *If yes, check the box if the account had greater than \$10,000 at any point during the tax year:*  \_\_\_\_\_
13. Were you the grantor, transferor or beneficiary of a foreign trust? \_\_\_\_\_
14. Were you a resident of, or did you have income from, more than one state during the year? \_\_\_\_\_
15. Do you wish to have \$3 (or \$6 on joint return) of your taxes applied to the Presidential Campaign Fund? \_\_\_\_\_



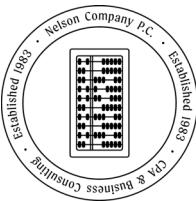
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Yes      No

16. Do you wish to contribute to any state fund(s)? If yes, indicate amount(s) and which fund(s): \_\_\_\_\_
17. Do you want any overpayment of taxes applied to next year's estimated taxes? \_\_\_\_\_
18. Is the bank information listed on last year's return still correct? If not, please provide a voided check or the new account details. **NOTE: The IRS no longer issues paper refund checks.** \_\_\_\_\_
19. Do either you or your spouse have any outstanding child or spousal support payments or federal debt? \_\_\_\_\_
20. Do you expect a large fluctuation in your income, deductions or withholding next year? *If yes, provide details.* \_\_\_\_\_
21. Did you receive any distribution from an IRA or other qualified plan that was partially or totally rolled over into another IRA or qualified plan within 60 days of the distribution? (Form 1099-R) \_\_\_\_\_
22. If you received an IRA distribution, which you did not rollover, provide details and Form 1099-R. \_\_\_\_\_
23. Did you "convert" IRA funds into a Roth IRA? If yes, provide details and Form 1099-R. \_\_\_\_\_
24. Did you receive any disability payments this year? \_\_\_\_\_
25. Did you receive tip income not reported to your employer? \_\_\_\_\_
26. Did you sell or purchase a principal residence or other real estate? If yes, provide the settlement sheet(s) (HUD-1). \_\_\_\_\_
27. Did you collect on any installment contract during the year? Provide details. \_\_\_\_\_
28. Did you receive tax-exempt interest or dividends not reported on Forms 1099-INT or 1099-DIV? \_\_\_\_\_
29. During this year, do you have any stocks that became worthless or business loans that became uncollectible? \_\_\_\_\_
30. Did you receive unemployment compensation? *If yes, provide Form 1099-G.* \_\_\_\_\_
31. Did you receive, or pay, any alimony during the year? *If yes, provide details, including the divorce settlement date and the amount paid and/or received.* \_\_\_\_\_
32. Did you have any casualty or theft losses during the year? *If yes, provide details.* \_\_\_\_\_
33. Did you have foreign income, pay any foreign taxes, or file any foreign information reporting or tax return forms? \_\_\_\_\_



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Yes      No

34. If there were dues paid to an association, was any portion not deductible due to political lobbying by the association or benefits received? \_\_\_\_\_

35. Did you, or do you plan to contribute before April 15, to a traditional IRA, or Roth IRA for last calendar year? *If yes, provide details and Form 5498.* \_\_\_\_\_

36. Did you, or do you plan to contribute before April 15 to a health savings account (HSA) for last calendar year? *If yes, provide details and Form 5498-SA.* \_\_\_\_\_

37. Did you receive any **distributions** from a health savings account (HSA)? *If so, provide details and Forms 1099-SA.* \_\_\_\_\_

38. Has the IRS, or any state or local taxing agency, notified you of changes to a prior year's tax return? *If yes, provide copies of all notices or correspondence received.* \_\_\_\_\_

39. Are you aware of any changes to your income, deductions and credits reported on any prior years' returns? \_\_\_\_\_

40. Did you purchase gasoline, oil, or special fuels for non-highway use vehicles? - *This is referencing a special credit that is rare for most people to be eligible for.* \_\_\_\_\_

41. Did you purchase a new or previously owned clean vehicle (EV or FCEV) by September 30, 2025? *If yes, please provide the purchase document.* \_\_\_\_\_

42. If you, or your spouse, have self-employment income, did you pay any health insurance premiums or long-term care premiums? \_\_\_\_\_

43. Were either you or your spouse eligible to participate in an **employer's** health insurance or long-term care plan? \_\_\_\_\_

44. If you, or your spouse, have self-employment income, do you want to make a retirement plan contribution? \_\_\_\_\_

45. Were you granted or did you exercise any stock options? *If yes, provide details.* \_\_\_\_\_

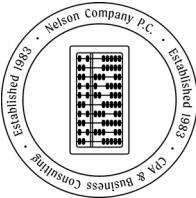
46. Were you granted any restricted stock (RSUs)? *If yes, provide details.* \_\_\_\_\_

47. Did you pay any household employee over age 18 wages of \$2,800 or more? \_\_\_\_\_  
If yes, provide a copy of Form W-2 issued to each household employee.  
If yes, did you pay total wages of \$1,000 or more in any calendar quarter to all household employees? \_\_\_\_\_

48. Did you surrender any U.S. savings bonds? \_\_\_\_\_

49. Did you use the proceeds from Series EE U.S. savings bonds purchased after 1989 to pay for higher education expenses? \_\_\_\_\_

50. Did you realize a gain on property which was taken from you by destruction, theft, seizure or condemnation? \_\_\_\_\_



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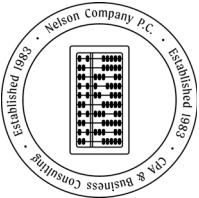
Please answer the following questions and **submit details** for any question answered **"Yes"**:

Yes No

51. Did you start a business? \_\_\_\_\_
52. Did you purchase rental property? If yes, provide the settlement sheet(s) (HUD-1). \_\_\_\_\_
53. Did you acquire any interests in partnerships, LLCs, S-Corporations, estates or trusts this year?  
If yes, provide Schedule K-1 that the Organization has issued to you. \_\_\_\_\_
54. Do you have records to support travel or gift expenses with regards to unreimbursed employee expenses or business expenses? *The law requires that adequate records be maintained for travel and gift expenses. The documentation should include amount, time and place, date, business purpose, description of gift(s) (if any), and business relationship of recipient(s).* \_\_\_\_\_
55. Did you incur unreimbursed expenses as an elementary or secondary educator? If so, how much? \_\_\_\_\_
56. Did you make any energy-efficient improvements to your home or pay for a home energy audit that was operational or completed by December 31, 2025? *If yes, please provide details with invoices and receipts.* \_\_\_\_\_
57. Can the Internal Revenue Service and state tax authority discuss questions about this return with the preparer? \_\_\_\_\_
58. If you live in a **state with sales tax**, did you make any large purchases or home improvements? \_\_\_\_\_
59. If you received health insurance through [HealthCare.gov](https://HealthCare.gov), please provide Form 1095-A from your online [HealthCare.gov](https://HealthCare.gov) account. \_\_\_\_\_
60. Did you purchase a new, U.S.-assembled vehicle in 2025 for personal use and financed with an auto loan? *If yes, please attach the vehicle statement from the dealer, including loan interest paid.* \_\_\_\_\_

## Due Diligence Questions for Earned Income Credit, Child Tax Credit, & Head of Household Filing Status (required questions):

61. Were you, the taxpayer, a US citizen or resident alien for all of 2025? \_\_\_\_\_
62. Are dependent(s) a U.S. citizen, a U.S. national, or a U.S. resident alien? \_\_\_\_\_
62. Are dependent(s) claimed on your tax return your: son, daughter, stepchild, foster child, brother, sister, stepbrother, stepsister, half-brother, half-sister, or a descendant of any of them (for example, your grandchild, niece, or nephew)? \_\_\_\_\_
63. Did dependent(s) live with you in the United States for more than half of 2025? *(Except for temporary absences, e.g. attending school)* \_\_\_\_\_



## Thorough but Important Tax Questionnaire

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Please answer the following questions and **submit details** for any question answered **"Yes"**:

Yes      No

64. Did, or are, any dependents(s) filing a joint return with another person for 2025? \_\_\_\_\_

65. Did dependent(s) provide over half of his or her own support for 2025? \_\_\_\_\_

66. Did you provide more than half the support for any person(s) other than your dependent children during the year?  
If yes, was the person(s)' gross income for the year less than \$5,200? \_\_\_\_\_

67. Do you believe dependent(s) could also meet the qualifications to be a qualifying child of another tax filer? \_\_\_\_\_

*Note: To qualify for the Child Tax Credit, we are required to obtain from you a document proving the existence of the child such as one of the following (that would have the child's name on it), please confirm one of the following has been provided to our office: School record or statement, Health care provider statement, Child care provider record, Place of worship statement, etc.*

Additional Details:

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