

2025

1040

US

**Miscellaneous Questions**

If any of the following items pertain to you or your spouse for 2025, please check the appropriate box and provide additional information if necessary.

Yes      No

Did your marital status change during the year?

Did your address change during the year? If yes, please provide your current address.

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Were there any changes in dependents?

Did you receive IRS Form 1095-A (Health Insurance Marketplace Statement)? If yes, please attach.

Did you have any foreign income or pay any foreign taxes?

Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC?

Did you buy or sell any stocks, bonds or other investment property in 2025?

Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? If yes, please provide the closing statement.

Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?

Did you purchase an energy-efficient or other new or used vehicle? If yes, please provide the purchase invoice.

Did you make a contribution to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.) or convert any retirement funds to ROTH's?

Did you receive any overtime pay in 2025?

Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school?

Did you incur expenses as an elementary or secondary educator? If yes, what was the amount?

Do you want to allocate \$3 to the Presidential Election Campaign Fund?

Does your spouse want to allocate \$3 to the Presidential Election Campaign Fund?

May the IRS discuss your tax return with your preparer?

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Yes  No 

Did you have an interest in or signature or other authority over a financial account in a foreign country including a foreign trust?

Did you receive an IP PIN from IRS? (It is issued annually if received in the prior year - if you have an account on irs.gov, log into your account on irs.gov to obtain it. Otherwise, it is mailed.) Please attach.

Were you notified or audited by either the Internal Revenue Service or the State taxing agency?

Did you or your spouse make any gifts to an individual that total more than \$19,000, or any gifts to a trust?

At any time during the tax year, did you: receive or sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

Is there any other pertinent information we will need to prepare your tax return?

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If you have an overpayment of 2025 taxes, do you want the excess applied to your 2026 estimated tax (instead of being refunded)?

Do you want to **direct debit tax owed to IRS**, if applicable? If yes, please provide your bank name, routing number and account number.

Do you want to **direct deposit any tax refund**, if applicable? If yes, please provide your bank name, routing number and account number.

Do you want to **establish automatic direct debits of your 2026 Estimated Tax Payments**, if applicable? If yes, please provide your bank name, routing number and account number.

List 2025 Estimated Tax Payment Amounts and Dates \_\_\_\_\_

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Bank Name \_\_\_\_\_

Routing No. \_\_\_\_\_ Acct No. \_\_\_\_\_

Please provide the name, phone number and/or email address (preferred) for tax questions and/or updates on the status of your tax return. **Choose your preferred method of contact by circling your phone number or email address.**

Name \_\_\_\_\_ Phone No. \_\_\_\_\_

Text? Yes \_\_\_\_\_ No \_\_\_\_\_ Email \_\_\_\_\_  
 Yes  No

Would you like to receive emails from our office with tax updates and office news? Follow us on **Facebook** or X for local events, up-to-date tax law changes, and other various information.