2025 Tax Questionnaire. Please check all questions that apply to you.

- ☐ Did your marital status change during the year? If yes, please explain.
- ☐ Did your address change during the year? If yes, please provide an updated address and date of move.
- ☐ Were you a resident of or did you have income from more than one state during the year? If yes, provide details including dates.
- ☐ Did you incur moving expenses due to a change of employment over 50 miles? Applies to CA tax return only. Provide details.
- ☐ Did you work out of town for part of the year, and your employer did not reimburse? CA deduct only, unless self-employed. Provide details.
- ☐ Did you use your car on the job (other than to and from work)? And have records written? If yes provide mileage. CA deduct only, unless self-employed.
- ☐ Do you have records to support business meals, travel, entertainment, or biz gift expenses you are deducting? The law requires you to document, time, place, date, and business purpose.
- ☐ New clients: Provide date of birth for you, your spouse, and your dependents.
- ☐ Provide both your and your spouse's cell number and email address to allow me to confirm I have current information.
- ☐ Were there any changes in dependents? If yes, please explain. Provide SSI# and DOB for additions.
- ☐ If you had a child born in 2025, do you want to setup a Trump savings account and elect to receive the $1,000 on-time contribution from the gov't. for this child?
- ☐ Do you have a child born before 2025 and under 18 years old, and want to setup a Trump savings account for the child?
- ☐ Did you adopt a child in 2025 and incur expenses for adoption? Provide details (AGI must be under $299,190)
- ☐ Could you be claimed as a dependent on another person's tax return for 2025?
- ☐ Do you and/or your spouse want to allocate $3 to the Presidential Election Campaign Fund?
- ☐ May the IRS discuss your tax return with your preparer? (question asked on IRS form yet; IRS will not discuss your tax returns without a signed form 2848 on file)
- ☐ Do you want me to file an extension on your behalf? If yes, I may need additional information. Extended returns are due 10/15/26.
- ☐ Did you receive, sell, send, exchange, or otherwise acquire any financial interest in virtual currency? Attach applicable documentation. Include 1099-DA
- ☐ Were you notified or audited by either the Internal Revenue Service or the State taxing agency? Attach notice. If you receive a PIN letter, attach.
- ☐ I file all federal and state tax returns electronically(e-file) unless you opt out. Are you opting out of e-file for an additional fee of $175?
- ☐ Did you pay childcare expenses? Please include childcare provider's name, address, phone # and EIN or SSI#.
- ☐ Did you pay an individual as a household employee (i.e. Nanny)? 2025 threshold is $2,800 to file federal payroll tax returns. Attach payroll tax returns if applicable. (2026 threshold $3,000)
- ☐ Did you have any children under age 19 or full-time students under age 24 at the end of 2025, with interest and dividend income more than $1,350, or total investment income more than $2,700?
- ☐ Were any of your unmarried children who might be claimed as a dependents 19 years of age or older at the end of 2025? If not a full-time student, is child's income $5,200 or more?

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- ☐ Did you pay interest on a student loan? Max $2,500 and AGI under $100K SGL, $200K MFJ. Attach form 1098-E from lender.
- ☐ Did you, your spouse, or a dependent incur tuition expenses that are required to attend a college, university, or vocational school? Provide form 1098-T. No credit allowed without this form or AGI above $180K ($90Ksingle).
- ☐ Did you receive a distribution from an Education Savings Account or a Qualified Tuition Program (529)? Did you use it for qualified education expenses? (Provide 1099Q)
- ☐ Did you cash any Series EE or I, U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents with funds? Applies to income under $179.2K MFJ and $114.5K SGL.
- ☐ Did you and your dependents have healthcare coverage for the full year? Attach forms 1095-B, California requires proof. (not applicable for Medicare)
- ☐ Did you or your family receive advance health premium tax credits (subsidized health ins including covered California)? If yes, attach forms 1095-A. Tax returns will be rejected by IRS if you fail to provide it for me. I may assess a $175 fee if IRS rejects and I redo.
- ☐ Did you (your employer) or your spouse (spouse's employer) contribute or withdraw funds used for unreimbursed qualified medical expenses from a health savings account (HSA not FSA)? Provide 5498SA/1099SA. Contribute for 2025 up to 4/15/26
- ☐ Did you apply an overpayment of 2024 taxes to your 2025 estimated tax (instead of being refunded)? Please confirm the amounts.
- ☐ Do you want your tax refunds directly deposited to your bank? If yes provide your bank account; name, routing, account numbers and checking or savings account.
- ☐ Do you want your tax balance due and estimated taxes directly withdrawn from your bank account? If yes provide your bank account; name, routing, account numbers and checking or savings.
- ☐ Did you pay estimated taxes for 2025? If yes, please attach details of the amounts and dates paid, and reconfirm dates and amount even if I previously provided to you.
- ☐ 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 expect your 2026 taxable income and withholdings to be different from 2025? If yes, we need to discuss if you need to make estimated tax payments for 2026. Provide projections for 2026.
- ☐ Did you or your spouse make any gifts to an individual or trust during the year that total more than $19,000? If yes, provide details.
- ☐ Did you purchase, sell, refinance your principal home or second home, or did you take a home equity loan? Provide copy of settlement statements, year-end mortgage statements and forms 1098 for all mortgage loans you had during the year for all real estate.
- ☐ If you have a home mortgage, was the debt balance used to purchase or improve this home? If not, explain.
- ☐ Did you have CA FTB withholding for a sale of real estate? If yes, attach form 593-B.
- ☐ Did you make any residential energy-efficient (clean energy) home improvements, or did you make purchases involving solar, wind, geothermal or fuel cell energy sources? Provide details. Eliminated 1-1-26

2025 Tax Questionnaire. Please check all questions that apply to you.

- ☐ Did you purchase a new or used electric vehicle before 10/1/25 that qualifies for the clean vehicle credit? Attach paperwork include VIN and form 15400. Income limits and vehicle purchase price limits apply.
- ☐ Did you pay interest on a loan to purchase of a new personal vehicle secured by the loan? Provide VIN and 1098-VLI. Does not apply if AGI over $100K SGL, $200K MFJ.
- ☐ Did you have any debts cancelled or forgiven including credit cards or real estate? (Provide 1099-C/1099-A)
- ☐ Did you have any foreign income or pay any foreign taxes? Provide information statements. As a reminder, income from all foreign sources must be reported.
- ☐ Did you live or work abroad? Provide details, you may be entitled to a foreign earned income exclusion of up to $130K.
- ☐ Did you have an interest in or signature authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account, including foreign trusts & annuity. You are required to report their existence.
- ☐ Did you timely file FBAR ($10K or sig authority over foreign acct) (FinCEN-filed through BSA e-filing system) this is not included in this tax filing. Due 4/15 w/automatic extension to 10/15 attach copy if applicable.
- ☐ Did you receive or pay spousal support (Federal Law: payment must be court ordered pre-2019 to deduct)? If yes, provide the amount and date of divorce decree. Effective 1-1-26 CA follows fed law for pre-2026 alimony.
- ☐ Did you receive gambling winnings? Attach W2G/1099 and statement of losses. Beginning in 2026 losses limited to 90% of wins.
- ☐ Did you incur a loss because of damaged or stolen property which exceeds 10% of your adjusted gross income (10% not always applicable) due to a federally declared disaster?
- ☐ Did you receive any taxable disability income, unemployment, or social security? Provide forms 1099-G, SSA-1099.
- ☐ Does anyone owe you money which has become uncollectible? Note: the IRS considers loans between family members to be "gifts" unless your documentation of the debt and substantiation of collectability is complete.
- ☐ Did you buy or sell any stocks, bonds, or other investment property in 2025? Provide brokerage statements showing sales and cost basis so I can calculate your gain(loss). Attach all 1099-B's & 1099-S. Please only upload once.
- ☐ Did you exercise stock options, ISOs (may trigger AMT), or purchase ESPPs, receive RSUs (NQSOs) and subsequently sell? Provide documentation.
- ☐ Did you incur expenses as an elementary or secondary educator including disinfectant supplies? If yes, how much?
- ☐ Did you receive a distribution from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.) Provide 1099R.
- ☐ Did you transfer or rollover any amount from one retirement plan to another retirement plan. Only one rollover is allowed per year, direct transfers between IRAs by trustees doesn’t trigger this limitation. Provide 1099R

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- ☐ Did you turn 73 years old in 2025(if born 1960+ RMD starts at age 75) and required to take RMD? Attach 1099R
- ☐ Are you over age 70 ½ (or spouse) and directly transferred IRA fund to an eligible charity? You each can transfer up to $108,000 in year 2025, $111,000 in year 2026, and include as part of your RMD. Provide details of transfer.
- ☐ Did you convert all or a portion of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2025. Provide details.
- ☐ Did you, or your spouse contribute to a traditional or ROTH-IRA for tax year 2025, provide detail. Contribute for 2025 up to 4/15/26. $7K +$1K over 50yrs. (2026 $7,500+$1,100)
- ☐ If you, or your spouse, have self-employment income, do you want to make a retirement plan contribution of the maximum by the due date of your tax returns or extended due date? If yes, do you have a SEP, or Solo 401K?
- ☐ Did you(spouse) transfer (donate) appreciated stock to a qualified charity? If yes, provide your original purchase date, cost and value at the date of your donation.
- ☐ Did you donate non-cash personal property to a charity? If yes, provide receipts to include description of donated items, and date with value of donated property.
- ☐ If you donated any amount of $250 or more to any single charity, please identify individually and confirm you have a donation receipt.
- ☐ Did you incur out of pocket expenses for travel while performing charity work? Provide amounts and total mileage driven.
- ☐ Did you incur medical expenses that exceed 7.5% of your adjusted gross income? Provide total amount and total mileage.
- ☐ Was your primary or vacation home rented out for more than 14 days or used for business? Please explain.
- ☐ Do you have a rental activity and would like to discuss the qualifications to apply the 20% QBI deduction which applies to net profit? Your rental activity may qualify as business for this deduction. Provide details.
- ☐ Did you invest in an opportunity zone fund? Please explain or attach documentation.
- ☐ Did you start a new business, purchase, or dispose of business assets (furniture, equipment, vehicles, real estate), or convert personal assets to business use in 2025? Attach details.
- ☐ Did you invest in a partnership or S corporation? Please attach K-1's unless I prepared. K-1 due 3/16/26 or 9/15/25 if extended.
- ☐ If you have a business which employs workers of which you claimed the employee retention credit or FFCRA paid leave credit in 2025? If yes, attach quarterly payroll tax return filings.
- ☐ Do you own a business (or qualified business rental property) and pay anyone $600 or more while doing business? If yes, did you file required 1099s? Threshold $2,000 for 2026.
- ☐ Did you receive forms 1099-K, 1099-NEC or 1099-MISC? If yes, attach.
- ☐ Do you have out-of-state or internet purchases for which California Sales Tax was not charged? If yes, provide. California use tax must be calculated and reported.
- ☐ List any concerns not addressed in other questions.