2025 Individual Tax Questionnaire (Page 1 of 7)

To facilitate our filing a *complete* and *accurate* tax return, it is imperative that you answer the questions below. *Please submit all your supporting data securely via Sharefile, fax, or encrypted email.*

Name(s): ____

For any question answered Yes, please explain and/or include supporting detail or documents. If any question is left blank, we will assume the response is "No" or "$ 0".

Please provide updated **email addresses** for the following (**IMPORTANT NOTE** - this is imperative for our electronic signature process):

Taxpayer: ____ Spouse: ____

Personal Information:	**Yes**	**No**
Did your marital status change during 2025?	_	_
Are you legally married?	_	_
If Yes, do you and your spouse want to file separate returns?	_	_
If Yes, will you file a joint federal return and be required to file single state returns?	_	_
Did your address or other contact information change during 2025?	_	_
Has your legal name been changed due to marriage?	_	_

If Yes, please provide updated information below:

____

____

Can you or your spouse be claimed as a dependent by another taxpayer?	_	_

Some states now require taxpayers to provide their driver's license information in order to electronically file tax returns and deter fraudulent electronically filed returns. Please provide your driver's license information to keep on file. (If updated or not provided in the prior year)

(T) License ID Number: ____________________ Issuing State: ____ Expiration Date (MM/DD/YY) ___________

Issue Date ___________ PIN ________

(S) License ID Number: ____________________ Issuing State: ____ Expiration Date (MM/DD/YY) ___________

Issue Date ___________ PIN ________

Did you move to another state in 2025?	_	_

If Yes, please provide an explanation below and date moved:

____

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Did you receive any income from more than one state in 2025?	_	_

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Dependents:	**Yes**	**No**
Were there any changes in dependents from the prior year? Note: Include non-child dependents for whom you provided more than half the support	_	_
Have any of your dependents filed returns claiming themselves this year?	_	_
If Yes to either of the above, please provide information below. Note that any newborn social security number(s) should be provided securely via your ShareFile portal or phone. ____ ____		
Did you pay for childcare (including summer camp) while you worked or looked for work?	_	_
Do you have any children under age 18 with unearned income of more than $2,700?	_	_
If single or married filing separately, did you have a dependent or child living with you for more than six months during the year?	_	_
Do you have any children aged 18 or student children, aged 19 to 23, who did not provide more than half of their cost of support with earned income and have unearned income of more than $2,700?	_	_
Did you adopt a child or begin adoption proceedings during 2025?	_	_
Identity Theft:		
Did you or your spouse experience IRS related identity theft in 2025 or prior years?	_	_
If so, did you receive an IRS issued Identity Protection Pin (IP PIN) for your 2025 return? **If you had an IP PIN in 2024, we will need your new one for 2025 to efile.** Please provide below:	_	_
IRS issued IP PIN for 2025 return: Taxpayer: ____________________ Spouse: ____________________		
Purchases, Sales and Debt:		
Did you have any debts canceled, forgiven, or refinanced during 2025? Please provide any 1099-C received (if applicable)	_	_
Did you start a new business, purchase a new rental property, farm, or acquire any new interest in any partnership or S corporation during 2025? List Here _____________________________________	_	_
Did you sell an existing business, farm, or any existing interest in a partnership or S Corporation during 2025?	_	_
Did you sell or rollover any original issuance Qualified Small Business Stock (QSBS/Section 1202 qualifying)?	_	_
Did you sell, exchange, or purchase any real estate or rental property, in 2025? If so, please include closing statements.	_	_
Did you withdraw any amounts from your Individual Retirement Account (IRA) or Roth IRA to acquire a first-time principal residence, for education, for medical reasons, for disability/death, or for health insurance? Please provide amounts utilized for any of the above purposes and any additional information.	_	_
Did you receive grants of stock options or Restricted Stock Units (RSUs) from your employer, exercise, hold, or sell any stock options or RSUs or dispose of any stock acquired under a qualified employee stock purchase plan? If Yes, please include support. If you have options or RSUs from this year or prior years, please provide a vesting schedule from your employer.	_	_
Did you pay any student loan interest in 2025?	_	_
Did you have an outstanding home equity loan at the end of the year? If so, please provide the principal balance at the beginning and end of the year.	_	_
Beginning Balance: ______________________ Ending Balance: ______________________		

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Purchases, Sales and Debt (Continued):	**Yes**	**No**
Was your home equity loan used to buy, build, or substantially improve the property that secures the loan?	_	_
Are you claiming a deduction for mortgage interest paid to a financial institution and someone else received the Form 1098?	_	_
Are you claiming mortgage interest paid to someone other than a bank or financial institution?	_	_
If so, did you receive a Form 1098? If not, please provide name and social security number.	_	_

Name: ____ SSN: _______________________________

Did you pay any car loan interest on loans that originated after 12/31/2024 for a vehicle for personal use with gross vehicle weight of less than $14K and final assembled in the US?	_	_
Did you sell any securities or virtual currency not reported on your Form 1099-B? (i.e., puts and calls, Cryptocurrency transactions (Bitcoin, Ethereum, etc.) *** If so, please provide all sale and cost basis information.	_	_

***Specifically for Cryptocurrency: Please provide the details of all activity inclusive of transferring currencies (for example: from Bitcoin to Litecoin) and/or using those funds to purchase online items or applicable Cryptocurrency ledgers (e.g.- Cointracker, Pionex, Coinsmart, etc.)

Estimated Income Tax Payments:

Did you make any Federal Estimated Tax Payments towards your 2025 income taxes?	_	_

If Yes, please list payment dates and amounts: _____________ _____________ _____________ _____________

Did you make any State Estimated Tax Payments towards your 2025 income taxes?	_	_

If Yes, please list the state along with payment dates, and amounts: _____________ _____________ _____________ ____________

If available, please provide payment confirmation support either via cancelled check or online payment printouts.

Itemized Deductions:

Did you make any large purchases, such as motor vehicles and boats?	_	_
Did you incur any casualty or loss attributable to a federally declared disaster?	_	_
For contributions made with cash to a charitable organization, do you have receipts substantiating the amount given?	_	_
For each contribution in the amount of $250 or more made with checks or credit cards to a charitable organization, do you have written acknowledgement from the charity substantiating the amount given? Written acknowledgements are required, and you should maintain this support (we do not require copies). Cancelled checks are insufficient.	_	_
Did you contribute property (other than cash) with a fair market value of more than $5,000 to a charitable organization? If Yes, this will require a third-party appraisal. Please upload a copy for us.	_	_

For all non-cash donations (e.g., clothing, furniture, securities, etc.) that exceed $500, please provide us copies of receipts for reporting purposes.

Foreign Reporting:

Have you or your spouse ever acted as a grantor or transferor for a foreign trust, held an interest in, or had signature or other authority over a bank account, securities account, or any other financial account located outside of the United States? If Yes, please see the foreign bank information section of the organizer.	_	_
Did you or your spouse own any foreign financial assets?	_	_

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Foreign Reporting (continued):	**Yes**	**No**
Did you create or transfer money or property to a foreign trust?	_	_
Do you own more than 10% of the stock in a foreign corporation?	_	_
Did you have any foreign income or pay any foreign taxes during 2025, other than those reported within your brokerage investment statements?	_	_
During 2025, did you receive a gift or inheritance from a foreign person?	_	_
Did you work outside the country during the year? If so, please provide country and number of days spent abroad: ______________________________________	_	_
IRAs, Retirement, and Savings Plans:		
Did you or your spouse contribute or convert any funds to a deductible or non-deductible IRA or Roth IRA during the year or by April 15, 2026? If Yes, please provide Form 5498.	_	_
Did you or your spouse roll over amounts from a retirement plan into your IRA during 2025?	_	_
Did you or your spouse make any qualified charitable distributions (QCD) from your IRA (must be over age 70 ½)?	_	_
Did you or your spouse have any transactions pertaining to a medical savings account (MSA) during 2025? If you received a distribution from an MSA, please include Form 1099-SA.	_	_
Did you or your spouse have any transactions pertaining to a health savings account (IHSA) during 2025? If you received a distribution from IHSA, please include Form 1099-SA.	_	_
Please provide details for any after tax contributions (not accounted for in your W2) for your HSA plan.		

Miscellaneous:		
Did you receive Form 1099-K for third party payments for goods and services from part-time work, side jobs, or the sale of goods?	_	_
Did you pay in excess of $1,000 in any quarter, or $2,600 during the year, for domestic services performed in or around your home to individuals who could be considered household employees?	_	_
If Yes, has a Form W-2 or Form 1099-MISC been issued to the respective individual(s)?	_	_
If Yes, please provide Schedule H information from your payroll provider.		
Did you receive tip income in 2025 as part of your occupation (e.g., food service, hospitality, personal services, entertainment, transportation, etc.)?	_	_
If so have you confirmed your employer is reporting properly on you W-2 based on current law and included on your Form W-2 or reported on a Form 1099 if self-employed?	_	_
Did you or your spouse receive distributions from long-term care insurance contracts? If Yes, please include Form 1099-LTC.	_	_
Did you use gasoline or special fuels for business or farm purposes (other than for a highway-use vehicle) during the year?	_	_
If Yes, please provide the gallons of gasoline or special fuels used for off-highway business purposes: Gallons: _________________ Type: _________________		
Have you received a punitive damage award or an award for damages other than for physical injuries or illness?	_	_
Were you notified by the IRS or other taxing authority of any changes in prior year returns? Please provide a copy of the correspondence if you have not already sent it to us.	_	_

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Miscellaneous (continued):	**Yes**	**No**
Did you install any alternative energy equipment or energy efficient improvements in your residence such as solar water heaters, new furnace, solar electricity, equipment (photovoltaic), temperature control systems, geothermal, biomass or fuel cells, qualifying exterior windows/doors, skylights, or insulation materials? If Yes, please provide supporting paperwork.	_	_
Did you purchase an electric vehicle between 1/1/2025 and 9/30/2025? If so, please provide the purchase documents along with the below: Date Purchased ________________ Vehicle Identification Number (VIN) __________________________ Model Name __________________	_	_
Did you engage in any bartering transactions?	_	_
Did you or your spouse serve in the military or were you or your spouse on active duty?	_	_
Severance/Retirement/Unemployment:		
Did you retire or change jobs in 2025?	_	_
Did you receive deferred, retirement or severance compensation? If Yes, enter the date received (MM/DD/YY). ___________	_	_
Did you or your spouse receive unemployment benefits during 2025? If so, please provide Form 1099-G	_	_
Sale of Your Home:		
Did you sell your home in 2025?	_	_
If Yes, did you receive a Form 1099-S?	_	_
If Yes, did you own and occupy the home as your principal residence for at least two years of the five-year period prior to the sale?	_	_
Did you ever rent out this property?	_	_
Did you ever use any portion of the home for business purposes?	_	_
Have you or your spouse sold a principal residence within the last two years? At the time of the sale, was the residence owned by the: Taxpayer ____ Spouse ____ Both ____?	_	_
Schedule C/Sole Proprietorship/Single Member LLC:		
Did you have income or loss from a sole proprietorship or single member LLC? If Yes, please complete the Schedule C section within the Organizer.	_	_
For purposes of the 20% pass-through Section 199A tax deduction, please provide a clear description of the nature of your business to include client deliverables, products or services sold, etc.		
Did you receive any Employee Retention Credit (ERTC) related funds during 2025? If Yes, for which tax year do they pertain (2021 or 2022) __________. Please provide any notices received regarding the credit, if applicable.	_	_
Real Estate Professional:		
Did you perform real estate activities such as rental, development, brokerage, acquisition, or management that exceeded 750 hours in all such activities and can you substantiate such hours claimed?	_	_
Did the real estate services you performed in 2025 exceed time spent in other occupations or industries?	_	_
Did you perform real estate activities such as rental, development, brokerage, acquisition, or management that exceeded 250 hours in each property and can you substantiate such hours claimed?	_	_

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S Corporation and Partnership/LLC:	**Yes**	**No**
Did you receive (or will you be receiving) any K-1s during 2025? If Yes, please refer to the Schedule E page in your Tax Organizer. List below those K-1's in which you materially participated (500 hours or more) ___________	_	_
Can you substantiate such hours claimed?	_	_
Did you incur any unreimbursed business expenses related to your S-Corporation or LLC? If Yes, please provide a summary by expense category.	_	_

Gifting

Did you make gifts of more than $19,000 to any individual or if married, did you and/or your spouse make combined gifts of over $38,000 to any individual? If Yes, please provide additional information below:	_	_

Gift amount: $____________________________________

Property type: ____________________________________

Recipient: ______________________________________

Relationship: ____________________________________

Education:

Did you withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children, or grandchildren? If Yes, please provide 1099s.	_	_
Did you or your dependents incur any post-secondary education expenses, such as tuition? Please provide 1098-T.	_	_
Did you utilize any EE or I bonds for education?	_	_

Trust and 529 Plans:

Did you form any new trusts this year?	_	_
For any trust you created or for which you are the trustee, have any beneficiaries passed away during 2025?	_	_
Did you withdraw amounts from a Coverdell Education Savings Account or Qualified Education Program (Section 529 plan)? If Yes, include Form 1099-Q.	_	_
Did you or your spouse make any contributions to Qualified State Tuition Plans (Section 529 plans) during 2025? If Yes, enter the following:	_	_

TS	**Name of Designated Beneficiary**	**State Sponsoring Plan**	**Account Number**	**2025 Amount Contributed**

Massachusetts:

If you paid tolls, Ezpass, or transit passes for commuting, please list amounts paid. ______________________

If you are a resident of Massachusetts, did you make any purchases out of state for which you owe use taxes?	_	_
Do you have a MassTax Connect online account?	_	_
If No, please mark "Yes" if you authorize us to create an online account to confirm your tax estimates.	_	_

If Yes, please provide a printout of your account showing the estimates paid.

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Massachusetts (continued): **Yes** **No**

Have you performed any work outside of your resident state during the year? _ _
If Yes, please note state and days worked: ____

If you paid rent for your primary residence, please provide amount $_________ and landlord's name. __________________________

Other items for planning:

Please provide details if any of the below items have changed from 2024:
- Updated your estate plan (will, living trusts, etc.)
- Name and contact information of your estate planning attorney
- Changes in disability/life insurance provider or coverage
- Changes in long-term care insurance
- Name and contact information of investment advisor
- Changes in retirement account holdings

2026 Tax Planning (Do you expect any of the following to occur in 2025?):

A change in your marital status or the number of dependents _ _
A substantial change in your income or withholdings; and/or
A substantial change in your deductions? _ _
If Yes to any of the above, please provide explanations below:

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Please provide a voided check if your bank account has changed from the prior year or you would like to use a bank account different than the prior year's. Examples of required forms to provide:

1) Wages (IRS W-2)
2) Interest Income (IRS 1099-INT)
3) Dividend Income (IRS 1099-DIV)
4) Brokerage Statements (Form 1099-A, B, S)
5) IRA/Pension/Annuity Income (IRS 1099R)
6) Schedule K-1s, K-2s, and K-3s (IRS and applicable states)
7) Mortgage Interest (Form 1098)
8) Estimated Tax Payments (copies of checks or complete the tax organizer section under "Federal Tax Payments")
9) Non-cash charitable donation receipts over $500 collectively

Have you uploaded or sent in all your information for tax preparation? _ _
If not, when is the expected date that all your data will be sent/uploaded? __________________________

Will you be receiving any requisite tax information (e.g., K1 forms, etc.) late or after the April 15, 2026 deadline that may warrant filing an extension? _ _

Will estimates be provided for these late K-1s? _ _
We will need K-1 estimates by April 1, 2026 to give us enough time to include in filing your return or extension.

Please provide details below:

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