

Client Name: _____

Tax Year 2025 Questionnaire

Please check the appropriate box and include all necessary details and documentation.

Personal Information

	Yes	No
Did your marital status change during the year?	☐	☐
If yes, explain: _____		
Did you live separately from your spouse during the last six months of the year?	☐	☐
Do you have a separate decree, instrument, or agreement and are not living in the same household by the end of the year?	☐	☐
Did you receive or pay alimony during the year? (If yes, please provide a copy of your alimony agreement if not already on file with us.)	☐	☐
Did your address change from last year?	☐	☐
Can you be claimed as a dependent by another taxpayer?	☐	☐
Do you have a bank account or other type of account with a routing transit number (RTN) and account number that can be used to direct deposit (or direct debit) funds?	☐	☐
Did you change any bank accounts, or did routing transit numbers (RTN) and/or bank account numbers change for existing bank accounts that have been used to direct deposit (or direct debit) funds from (or to) the IRS or other taxing authority during the tax year?	☐	☐
Do you, your spouse (if applicable), and any dependents have a taxpayer identification number (SSN, ITIN, or ATIN)? (Please provide if not already on file.)	☐	☐
Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? <i>If yes, attach the IRS notice for filing returns in 2026.</i>	☐	☐
Did you reside in or operate a business in a Federally declared disaster area? The Federally declared disaster areas include victims of hurricanes, tropical storms, floods, as well as wildfires and other disaster situations.	☐	☐

Dependent Information

	Yes	No
Were there any changes in dependents from the prior year?	☐	☐
If yes, explain: _____		
Did any children who live with you spend more than half the year with you in the United States? ☐ Not Applicable	☐	☐
Do you have any children under age 19 or a full-time student under age 24 with <i>unearned income</i> in excess of \$2,700?	☐	☐
Do you have dependents who must file a tax return?	☐	☐
If yes, are you interested in Jennings & Clouse, PLC preparing the return?	☐	☐
Did you provide over half the support for any other person(s) other than your dependent children during the year?	☐	☐
Did you pay for child care while you worked, looked for work, or while a full-time student?	☐	☐
Are there any other person(s) who lived with you more than half the year in the United States but not claimed by you last year?	☐	☐
Did you pay any expenses related to the adoption of a child during the year?	☐	☐
If you are divorced or separated with child(ren), do you have a divorce decree or other form of separation agreement which establishes custodial responsibilities?	☐	☐
Did any dependents receive an Identity Protection PIN (IP PIN) from the IRS or have they been a victim of identity theft? If yes, attach the IRS notice for use during the 2026 filing season.	☐	☐
Do you have an eligible child under age 18 and want to open a new tax-deferred investment account called a "Trump Account" that will be available in July 2026?	☐	☐
If you initiate a Trump Account for any eligible child born in 2025, a contribution pilot program provides a \$1,000 contribution. Do you wish to receive the contribution?	☐	☐

Purchases, Sales and Debt Information

	Yes	No
Did you start a new business or purchase rental property during the year?	☐	☐

Did you have ownership interest in any type of business?	☐	☐
Did you sell, exchange, or purchase any assets used in your trade or business?	☐	☐
Did you acquire a new or additional interest in a partnership or S corporation?	☐	☐
Did you sell, exchange, or purchase any real estate during the year?	☐	☐
Did you purchase or sell a principal residence during the year?	☐	☐
Did you foreclose or abandon a principal residence or real property during the year?	☐	☐
Did you acquire or dispose of any stock during the year?	☐	☐
Did you take out a home equity loan this year?	☐	☐
Did you refinance a principal residence or second home this year?	☐	☐
Did you sell an existing business, rental, or other property this year?	☐	☐
Did you lend money with the understanding of repayment and this year it became totally uncollectable?	☐	☐
Did you have any debts canceled or forgiven this year, such as a home mortgage or student loan(s)?	☐	☐
Did you purchase a new or previously owned clean vehicle this year that is eligible for the new clean vehicle credit? If yes, attach the vehicle statement from the dealer even if you received the credit when purchased at the dealer.	☐	☐
Did you receive a <i>Form 1099-K</i> for the sale of personal property for a gain or loss?	☐	☐
Did you purchase a new U.S. assembled vehicle in 2025 for personal use and financed with an auto loan? <i>If yes, attach the vehicle statement from the dealer with total amount of interest paid.</i>	☐	☐

Income Information

	Yes	No
Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer?	☐	☐
Did you receive any income from property sold prior to this year?	☐	☐
Did you receive any unemployment benefits during the year?	☐	☐
Did you receive any disability income during the year?	☐	☐
Did you receive any Medicaid waiver payments as difficulty of care during the year?	☐	☐
Did you receive tip income not reported to your employer this year?	☐	☐
Did any of your life insurance policies mature, or did you surrender any policies?	☐	☐
Did you receive any awards, prizes, hobby income, gambling or lottery winnings?	☐	☐
Did you receive any income considered to be nonemployee compensation?	☐	☐
Did you receive a <i>Form 1099-K</i> , 1099-MISC, 1099-NEC, or other income statement for work done in what is commonly referred to as <i>the "gig" economy</i> ?	☐	☐
Did you receive a <i>Form 1099-K</i> for a distribution payment from an online crowdfunding solicitation?	☐	☐
Did you receive a <i>Form 1099-K</i> that you believe is in error?	☐	☐
Do you expect a large fluctuation in income, deductions, or withholding next year?	☐	☐
Did you have any sales or other exchanges of digital assets (including from an airdrop or a hard fork) or use digital assets to pay for goods or services?	☐	☐
Did you receive a <i>Form 1099-DA</i> for the sale of a digital asset?	☐	☐
Did you receive tips in 2025 in a job where tips are customary? For example, food service, hospitality, salons, or transportation.	☐	☐
Did you receive overtime pay required under federal overtime rules for working more than 40 hours in a work week?	☐	☐

Retirement Information

	Yes	No
Are you an active participant in a pension or retirement plan?	☐	☐
Did you receive any Social Security benefits during the year?	☐	☐
Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?	☐	☐
If yes, were any withdrawals due to a Federally declared disaster?	☐	☐
If you received any qualified disaster retirement plan distributions, did you repay any of the distributions in 2025?	☐	☐
Did you receive any lump-sum payments from a pension, profit sharing or		

401(k) plan?	☐	☐
Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?	☐	☐
Did you receive any qualified birth or adoption distributions, emergency personal expense distributions, domestic abuse distributions, or terminal illness distributions in 2025?	☐	☐
If yes, did you repay any of the distributions in 2025?	☐	☐
Did you make any qualified charitable distributions (QCD) <i>from your retirement account</i> this year?	☐	☐

Education Information

	Yes	No
Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year?	☐	☐
Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent?	☐	☐
Did anyone in your family receive a scholarship of any kind during the year?	☐	☐
If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board?	☐	☐
Did you make any withdrawals from an education savings or 529 Plan account?	☐	☐
If yes, were any of these withdrawals rolled over into an ABLE (Achieving a Better Life Experience) account?	☐	☐
Did you make any contributions to an education savings or 529 Plan account?	☐	☐
Did you pay any student loan interest this year?	☐	☐
Did you cash any Series EE or I U.S. Savings bonds issued after 1989?	☐	☐

Health Care Information

	Yes	No
Did you have qualifying health care coverage, such as employer-sponsored coverage or government-sponsored coverage (i.e. Medicare/Medicaid) for your family? "Your family" for health care coverage refers to you, your spouse if filing jointly, and anyone you can claim as a dependent. (If yes, attach Form(s) 1095-B or 1095-C.)	☐	☐
Did you enroll for lower cost Marketplace Coverage <i>through healthcare.gov</i> under the Affordable Care Act? (If yes, attach Form 1095-A.)	☐	☐
Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act and share a policy with anyone who is <i>not</i> included in your family?	☐	☐
Did you make any contributions to a Health savings account (HSA) or Archer MSA? (If yes, attach Form 5498-SA.)	☐	☐
Did you receive any distributions from a Health savings account (HSA), Archer MSA, or Medicare Advantage MSA this year? (If yes, attach Form 1099-SA.)	☐	☐
Did you pay long-term care premiums for yourself or your family?	☐	☐
Did you make any contributions to an ABLE (Achieving a Better Life Experience) account? (If yes, attach Form 5498-QA.)	☐	☐
Did you receive any withdrawals from an ABLE (Achieving a Better Life Experience) account? (If yes, attach Form 1099-QA.)	☐	☐
If you are a business owner, did you pay health insurance premiums for your employees this year?	☐	☐
If yes, did you acquire the insurance through the SHOP marketplace?	☐	☐

Itemized Deduction Information

	Yes	No
Did you incur a casualty or theft loss or any condemnation awards during the year?	☐	☐
If yes, did the loss occur in a Federally declared disaster area?	☐	☐
Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?	☐	☐
If yes, please provide estimate of total paid so that we may advise \$_____.		
Did you make any cash or other monetary charitable contributions?	☐	☐
Did you make any noncash charitable contributions (clothes, furniture, etc.)?	☐	☐
If yes to either of the above charitable contribution questions, please provide evidence such as a receipt from the donee organization, canceled check, or record of		

payment, to substantiate all contributions made.		
Did you donate a vehicle or boat during the year?	☐	☐
If yes, attach Form 1098-C or written acknowledgement from donee organization.		
Did you pay real estate taxes for your primary home and/or second home?	☐	☐
Did you pay any state income tax, including withholdings and estimated payments?	☐	☐
Did you pay any city or local income taxes, including withholdings and estimated payments?	☐	☐
Did you pay any personal property tax, such as vehicle, boat, or RV?	☐	☐
Did you pay any mortgage interest on an existing home loan?	☐	☐
If yes, attach Form 1098.		
Did you incur interest <i>expenses</i> associated with any investment accounts you held?	☐	☐
Did you make any major purchases during the year (cars, boats, etc.)?	☐	☐
If yes, provide the Bill of Sale or amount of sales tax paid \$_____.		
Did you make any out-of-state purchases (by telephone, internet, mail, or in person) for which the seller did not collect state sales or use tax?	☐	☐

Miscellaneous Information

	Yes	No
Did you make federal estimated tax payments for 2025?	☐	☐
If yes, provide all amounts and dates paid.		
If you operate a business:		
Did you make payments in 2025 that would require you to file Form 1099(s)?	☐	☐
If yes, did you or will you file Form 1099(s)?	☐	☐
Did you make gifts of more than \$19,000 to any individual?	☐	☐
Did you utilize an area of your home for business purposes?	☐	☐
Are you an eligible educator with unreimbursed qualified expenses?	☐	☐
Did you receive goods or services in exchange for your goods or services (barter)?	☐	☐
Did you retire or change jobs this year?	☐	☐
Did you incur moving costs because of a permanent change of station as a member of the Armed Forces on active duty?	☐	☐
Did you pay any individual as a household employee during the year?	☐	☐
Did you make energy efficient improvements to your main home this year?	☐	☐
Did you receive a distribution from, or were you a grantor or transferor for a <i>foreign</i> trust?	☐	☐
Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a <i>foreign</i> country?	☐	☐
Do you have any <i>foreign</i> financial accounts, <i>foreign</i> financial assets, or hold interest in a <i>foreign</i> entity?	☐	☐
Are you a <i>foreign</i> owner or do you control 25% of a <i>foreign</i> company's ownership interest for a <i>foreign</i> company registered with a secretary of state or similar office?	☐	☐
If yes, did you file its initial Beneficial Ownership Information Report (BOIR)?	☐	☐
If you were required to file a Beneficial Ownership Information Report (BOIR) with the Financial Crimes Enforcement Network (FinCEN), has any of the previously reported information changed (for either the <i>foreign</i> reporting company or any of the beneficial owners)?	☐	☐
Did you receive correspondence from the State or the IRS?	☐	☐
If yes, explain: _____		
Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due?	☐	☐
Do you want to designate \$3 to the Presidential Election Campaign Fund? If you check yes, it will not change your tax or reduce your refund.	☐	☐

This information is complete and accurate to the best of my knowledge:

Client Signature: _____ Date: _____