

Tax Year 2025 Questionnaire

Please check the appropriate box and include all necessary details.
(Do not send us your tax documents via email or text message.)

Name: _____

Current Year Updates:

Yes No

- ☐ ☐ Did you get married during the year?

If yes, provide date of marriage, spouse's full name, social security number, date of birth and include spouse's previous-year tax return with your documents.

- ☐ ☐ Did you divorce during the year?

If yes, please provide the date divorce was finalized. _____

- ☐ ☐ Did you move? **If yes**, please provide:

New address: _____

Date of move: _____

- ☐ ☐ Did you change jobs from last year? **If yes**:

Current Employer: _____ Date started: _____

Previous Employer: _____ Date left: _____

- ☐ ☐ Did you open or close any investment accounts in 2025?

If yes, please provide institution name and last four digits of account(s) and date opened:

Opened: _____

Closed: _____

- ☐ ☐ Did you have any sales or exchanges using **virtual currencies**? If yes, please include gain/loss report with documents.

- ☐ ☐ Did you receive a 6-digit Identity Protection Pin (IP PIN) from the IRS?

If yes, please include the IRS letter(s) or go to IRS website to retrieve (irs.gov).

If you had an IP PIN last year, a new PIN is issued by the IRS each calendar year.

- ☐ ☐ Did you or your spouse renew your Driver's License?

If yes, please provide:

Taxpayer: issue date _____ expiration date _____

Spouse: issue date _____ expiration date _____

Please provide us with totals and keep all receipts at home for your records.

Tax Year 2025 Questionnaire

Please check the appropriate box and include all necessary details.
(Do not send us your tax documents via email or text message.)

Your Financial Team

We like to be reminded of the advisors with whom we share client relationships.

Please provide the names of your professionals:

Financial Advisor: _____ Firm: _____

Attorney: _____ Firm: _____

One Big Beautiful Bill Act (OBBBA)

Yes No

☐ ☐ Did you earn any tips?

If yes, please provide amount: _____

☐ ☐ Did you receive overtime compensation during the year? If yes, please include your last paystub of the year or confirmation from your employer.

☐ ☐ Did you purchase a qualifying NEW (not used) vehicle for personal use in 2025 with a loan?

If yes, please provide:

VIN# _____

Interest paid on vehicle loan in 2025 _____

Estimated Tax Payments

Yes No

☐ ☐ Did you pay any Federal, State, School District, or City quarterly estimated taxes? (Also, see the “Estimated Taxes” pages in the Organizer.)

If yes, please provide dates and amounts of each estimated tax payment:

	Date Paid	Federal	State	School District	City
	mm/dd/yyyy				
1st Quarter		\$	\$	\$	\$
2nd Quarter		\$	\$	\$	\$
3rd Quarter		\$	\$	\$	\$
4th Quarter		\$	\$	\$	\$

Please provide us with totals and keep all receipts at home for your records.

Tax Year 2025 Questionnaire

Please check the appropriate box and include all necessary details.
(Do not send us your tax documents via email or text message.)

Children & Education

Yes No

- ☐ ☐ Will your dependent file a 2025 tax return?

If yes, please make sure your child does NOT claim themselves.

- ☐ ☐ Do you have any children under age 18, or under age 24 and a full-time student, with investment income in excess of \$2,500?

If yes, please provide all children's all Forms 1099-INT, 1099-DIV and/or 1099-B.

- ☐ ☐ Were there any changes in dependents from the prior year?

- ☐ ☐ Did you have a new baby or adopt a child? Please provide full name, birthday & Social Security Number or explain other changes below:

- ☐ ☐ Do any of your dependents no longer live with you? If so, indicate below which dependent and date of move. Do not consider time spent away at college.

- ☐ ☐ Did you pay for childcare expenses?

If yes, please include each Provider's name, EIN/SSN and amount paid per child:

PROVIDER'S NAME	EIN/SSN	AMOUNT PAID	CHILD NAME

- ☐ ☐ Did you make any Section 529 Tuition Plan Contributions?

If yes, please provide amount per child: _____

- ☐ ☐ Did you or your dependent(s) attend college.

If yes, please provide Form 1098-T. (Login to school account to obtain this form)

*If you or your dependent(s) received scholarships, please provide details of what the scholarship funds were used for (ex: tuition and fees statement) with your documents.

Please provide us with totals and keep all receipts at home for your records.

Tax Year 2025 Questionnaire

Please check the appropriate box and include all necessary details.
(Do not send us your tax documents via email or text message.)

Retirement

Yes No

- ☐ ☐ Did you receive a distribution/rollover from a retirement plan (401(k), IRA, etc.)?

If yes, please include all Forms 1099-R.

- ☐ ☐ Did you convert IRA dollars to ROTH? *If yes, include Form 1099-R, and conversion amount: \$ _____ Estimated date of conversion: _____*

- ☐ ☐ Did you make any contributions to your IRA or Roth retirement account?

If yes, please indicate how much and which accounts for each of you:

Taxpayer _____ ☐ Roth ☐ IRA

Spouse _____ ☐ Roth ☐ IRA

- ☐ ☐ Did you make a Qualified Charitable Distribution (QCD) from your IRA?

If yes, please include documentation, and enter amount distributed to charity:

\$ _____

If no document to include: please provide amount distributed to charity, indicate from which IRA account distribution was made and by whom (taxpayer or spouse).

Medical & Health Care Information

Yes No

- ☐ ☐ Did you purchase insurance through Healthcare.gov?

If yes, please indicate who is covered and include all Forms 1095-A.

- ☐ ☐ Is your health insurance through your public pension?

If yes, include your benefit payment statement for the healthcare deduction.

- ☐ ☐ Did you have a Health Savings Account (HSA)?

If yes, please include Form 1099-SA for distributions and/or 5498-SA for contributions (optional). If you do not receive the relevant forms in the mail, they can be found on your HSA provider's website.

Purchases, Sales & Debt Information

Yes No

- ☐ ☐ Did you obtain a home equity loan or refinance any real estate?

- ☐ ☐ Did you sell an existing business, rental, or other property this year?

If yes, please include an ALTA or HUD statement.

****Please provide us with totals and keep all receipts at home for your records.****

Tax Year 2025 Questionnaire

Please check the appropriate box and include all necessary details.
(Do not send us your tax documents via email or text message.)

Purchases, Sales & Debt Information cont.

Yes No

- ☐ ☐ Did you have any debt cancelled or forgiven this year?
If yes, please include all Forms 1099-C.
- ☐ ☐ Did you purchase an ELECTRIC vehicle before October 1, 2025? *Hybrid vehicles can be disregarded*
If yes, please be sure to include your Seller's Report.
(Applies if income < \$150,000 Single or \$300,000 Married)

Deductions

Yes No

- ☐ ☐ Do you own a home with a mortgage?
If yes, please include Form 1098, reporting mortgage interest paid.
- ☐ ☐ If you pay your real estate taxes separately from your mortgage payment, include the amount paid in 2025: \$ _____
- ☐ ☐ Did you make any Cash Donations?
If yes, please provide total amount donated: \$ _____
- ☐ ☐ Did you make any Noncash Charitable Donations?
If yes, please provide total value of amount donated: \$ _____
(If donation amount exceeds \$500, please include a list of each charitable organization along the value of the donation.)
- ☐ ☐ Did you make a donation to a state credit eligible scholarship-granting organization (SGO)?
If yes, you must provide a copy of the SGO letter.
- ☐ ☐ Do you have any out-of-pocket medical expenses?
Prescriptions: \$ _____
Medical Expenses: \$ _____
Mileage: _____
Long Term Care: \$ _____
Medical Insurance Premiums (not paid through employer): \$ _____
- ☐ ☐ Do you have any gambling winnings to report?
Please include all W-2G's & Win/Loss Reports/Forms.
Include total losses from gambling in 2025: \$ _____

Please provide us with totals and keep all receipts at home for your records.

Tax Year 2025 Questionnaire

Please check the appropriate box and include all necessary details.
(Do not send us your tax documents via email or text message.)

Miscellaneous Information

Yes No

- ☐ ☐ Did you make gifts of more than \$19,000 in cash or property to any individual?
If yes, please describe the gift(s), amount, Social Security Number & address for each recipient.

- ☐ ☐ K-12 Teachers, please provide total you spent on school supplies
(Please keep receipts at home). \$ _____
- ☐ ☐ Do you have ownership of any financial accounts based in a foreign country with a balance of \$10K or more at any point during the year? (bank accts, retirement, etc)
(Do not include investments in your brokerage account)
If yes, please provide the bank name, address, account number & highest balance during the calendar year in U.S. Dollars

- ☐ ☐ Did you collect unemployment in 2025?
If yes, please include **Form 1099-G**.
- ☐ ☐ Did you pay or receive alimony?
If yes, please provide amount paid or received. \$ _____
- ☐ ☐ Did you receive any correspondence from any taxing agency?
If yes, **ONLY** provide if you have **NOT** already given it to us.
- ☐ ☐ Do you expect any significant changes in income and/or deductions next year?
If yes, please elaborate:

Direct Deposit Information

Per NEW IRS regulations, they are phasing out paper refund checks. To avoid long delays (approximately 6 weeks) in receiving your refund, they strongly encourage direct deposit. Please verify/update your bank information on the "Direct Deposit" page in the organizer to receive refunds via direct deposit. If you are adding or changing an account, please provide a copy of a voided check or a printout of the bank routing & account number.

****Please provide us with totals and keep all receipts at home for your records.****

Tax Year 2025 Questionnaire

Please check the appropriate box and include all necessary details.
(Do not send us your tax documents via email or text message.)

How would you like your tax return copy for your records?

Choose one option below:

- ☐ Paper process, where I receive a folder with a paper copy of my returns and I sign my authorization forms manually. Please indicate your preferred method of contact for when your return is complete and ready for pick up:
- ☐ Text
 - ☐ Call
 - ☐ Mail (with a confirmation call first)
Additional postage fee added
- ☐ Digital process, via SafeSend, where I receive an e-mail link with a digital copy of my return and I sign my authorization forms digitally. I will NOT receive a paper copy of my tax return or any other paper documents. Everything will be provided within SafeSend & remain accessible digitally for up to 7 years.

If you would like to learn more, please visit our website: <https://nichols-cpas.com/features/safesend-returns-resource-center/>

Note that your returns will be e-filed upon receipt of payment for services and all signed documents, regardless of delivery method chosen.

****Please provide us with totals and keep all receipts at home for your records.****