



**Reviewing & completing this checklist will greatly facilitate the preparation of your tax return(s).** Please **return this document** with your tax paperwork:

Please remember to submit the following most common income items:

- W-2 for wages: overtime &/or tips deduction- please provide amounts if applicable and not already stated on your W2
- 1099 Div forms for dividend income
- 1099 Int forms for interest income
- 1099 R or SSA forms for retirement income
- Gambling Income
- 1099 Misc for rent income or 1099 NEC for non-employee compensation
- Tax refund form 1099 G for last year's refund
- Unemployment compensation
- Business income

Please remember to submit the following most common expenses to deduct (write amount in margin but I would also like to see the supporting document(s)):

- Real estate taxes
  - Mortgage Interest (Form 1098) or interest expense paid on a financed RV
  - Contributions, please provide substantiation – cash or non cash
  - Business expenses (please provide detail)
  - Gambling expenses
  - If you, or your spouse, are full time educators, please inform me of your out-of-pocket expenses. There is a federal deduction and a \$100 credit on the Indiana return for eligible teachers
  - Student loan interest on higher education debt, please provide form
  - HSA distribution or contribution made by you (not your employer)
  - Tuition or fees for higher education, please provide Form 1098-T
  - Excise tax portion on your personal vehicles (your car registration)
  - Any other deduction information – provide detail
  - Provide total contributions to a college 529 plan and the account #
  - Indiana residents–provide amounts paid to InvestABLE accounts
  - Indiana residents–provide residential rent paid & landlord's name/address
  - Indiana residents-please advise on the number of dependents that are either homeschooled or in private school (grades K-12).
  - Indiana residents – provide total paid to health care sharing ministries
  - Ohio residents - provide a copy of your driver's license if it renewed or if you are a new client to the firm.
  - Car interest deduction on new cars (need VIN, make and model of car, minivan, SUV, truck or motorcycle; campers, trailers & RV's do NOT qualify
- Medical expenses (prescription drugs, doctors, dentists, eyewear, miles on vehicle, etc.) generally cannot be deducted unless you incur a lot of unreimbursed expenses. This deduction is dependent upon income & whether you itemize.

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\*2025 Standard deduction amount: Single \$15,750 and MFJ \$31,500

\*\*2026 Standard deduction amount: Single \$16,100 and MFJ \$32,200

## Individual Federal and State Tax Return Questionnaire, Page 2

Please answer the following questions by writing 'yes', 'no' or the requested information in the margin.

- Did you adopt any child(ren) in 2025? If so, provide name and SS#.
- Did your marital status change during 2025? If so, to what.
- Did your address change in 2025 or 2026? If so, please provide address and date it changed. The prior year's address will be used unless you tell me otherwise.
- **Can you** (not 'will you') be claimed as a dependent by another taxpayer?
- Do you have any children under age 24 with interest, dividends or gains of over \$2,500?
- Are any of your dependents married?
- Were there any changes in dependents from the prior year? If yes, explain and if there is a new dependent, provide name, date of birth and SS#.
- Amount of child care paid while you worked or looked for work?
- Did you sell any assets in 2025 (house, stocks, business ownership or stock club ownership)?
- Did you pay any estimated tax payments towards 2025 taxes on the due dates of April 15<sup>th</sup> 2025, June 15<sup>th</sup> 2025, Sept 15<sup>th</sup>, 2025 or January 15<sup>th</sup> 2026? If so, please write the amount paid for federal and for state taxes.
- Did you make a large purchase in 2025 (car, boat, RV, etc.)? Provide sales tax paid on item.
- Did you take a distribution from your retirement funds? Please provide the 1099-R form.
- What state were you a resident of as of December 31<sup>st</sup>?
- If you are a part-year resident, please provide dates of residency for each state.
- What was your county of residence as of January 1, 2025?
- What was your spouse's county of residence as of January 1, 2025, if applicable?
- What school district do you currently live in?
- Did you have foreign income, pay any foreign taxes, or file any foreign information reporting or tax return forms? Provide details.
- **At any time during the year, did you have a financial interest in, or signature authority over a financial account such as a bank or a securities account located in a foreign country? Please notify me if you would like me to efile Form 114 for you.**
- Are you planning on contributing to a Roth IRA, deductible IRA or nondeductible IRA?
- What bank account do you want your refund to be deposited? Provide the name of financial institution, account #, routing # and whether it is a checking or savings account.
- Did you install a new exterior door or window, AC unit, furnace, water heater or geothermal system (note: roofs do not qualify for an energy credit)?
- May I be authorized to speak to the IRS or state, on your behalf, in the event there are questions about your return?
- Did you or your spouse receive, sell, or exchange a financial interest in virtual currency?
- If you purchased marketplace health insurance, please provide Federal Form **1095-A**.
- Do you expect a large fluctuation in your income, deductions, or withholdings next year?

**If you started a new business & acquired a federal EIN that I do not know about, please advise.**

Please provide phone number(s) and the email address I may reach you most efficiently.

Please list any phone number or email address you **no longer** use.