Questionnaire

Name: SSN:

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Personal Information

Yes No

- ☐ ☐ Did your marital status change during the year?
  If "Yes," explain. _____
- ☐ ☐ If your filing status is married, but you are filing separately from your spouse, did you and your spouse live apart for the last six months of 2025?
- ☐ ☐ Did your name change during the tax year?
- ☐ ☐ Can you or your spouse be claimed as a dependent by someone else?
- ☐ ☐ Did your address change during the year?
- ☐ ☐ Were you, your spouse, or any dependents a victim of identity theft?
  If "Yes," explain. _____
- ☐ ☐ Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?
  If "Yes," provide Notice CP01A from the IRS.

Provide proof of identity to be eligible to e-file your tax return (driver's license or state-issued photo ID)

Health Care Information

Yes No

- ☐ ☐ Did any member of your household have healthcare coverage through the Marketplace (Obamacare)?
  If "Yes," provide copies of Form 1095-A.
- ☐ ☐ Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?
  If "Yes," provide copies of Form 1099-SA and Form 5498-SA
  Is your HSA individual or family coverage
  - ☐ Individual Health Savings Plan
  - ☐ Family Health Savings Plan
  - ☐ ☐ Were all your HSA distributions used for medical expenses?

Personal Income

Yes No

- ☐ ☐ Did you receive any tips not reported to your employer?
- ☐ ☐ Did you receive any disability income during the year?
- ☐ ☐ Did you cash in any U.S. savings bonds during the year?
- ☐ ☐ Did you buy or sell any stocks, bonds, or other investments during the year?
- ☐ ☐ Did you receive any principal or interest during this year from property sold in prior years?
- ☐ ☐ Did you receive any other income you have not provided information for with this organizer?
  If "Yes," explain. _____

Purchases, Sales, and Debt Information

Yes No

- ☐ ☐ Did you sell, exchange, or purchase any real estate during the year?
  - ☐ ☐ A principal residence?
    If "Yes," provide closing documentation for the purchase & sale of the home.
  - ☐ ☐ A rental porperty?
  - ☐ ☐ A business property
  - ☐ ☐ Other _____
- ☐ ☐ Did you have a principal residence or a piece of real property foreclosed on during the year?
- ☐ ☐ Did you refinance your principal home or second home or take out a home equity loan during the year?
  If "Yes," provide all escrow, closing, and other pertinent documentation and information.
- ☐ ☐ Did you have any debts canceled or forgiven this year?
- ☐ ☐ Did you purchase a new or previously owned clean vehicle (electric vehicle, plug-in hybrid, fuel-cell vehicle, qualified commercial clean vehicle) during the year?
  If "Yes," provide the report the dealer or seller is required to provide to you and the vehicle identification number (VIN).

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Business Income

Yes	No	
☐	☐	Are you a business owner who paid health insurance premiums for your employees during the year?
☐	☐	Did you start a new business or purchase any rental property during the year?
☐	☐	Did you sell an existing business, rental property, or other property during the year?
☐	☐	Did you purchase any business assets or convert any assets to business use? If "Yes," provide the cost of the asset, the date it was placed in service, and the business use percentage.
☐	☐	Did you purchase any gasoline, diesel, or special fuels for off-road business use?
☐	☐	Did you rent out your home or use it for business? (If "Yes" provide details, sq. footage of house & office)
☐	☐	Did you acquire a new or additional interest in a partnership or S corporation?

Did you receive income or incur expenses associated with:

Yes	No	If "Yes," provide documentation.
☐	☐	A fantasy sports league?
☐	☐	Car sharing (e.g., Lyft or Uber)?
☐	☐	Freelancing (e.g., Upwork or TaskRabbit)?
☐	☐	Fashion sharing (e.g., Poshmark or thredUP)?
☐	☐	Crowdfunding (e.g., Kickstarter or Indiegogo)?
☐	☐	A short-term rental (e.g., Airbnb, VRBO or HomeAway)?
☐	☐	An independent contractor (e.g., Shipt, Instacart, DoorDash)?

Retirement Information

Yes	No	
☐	☐	Did you make any contributions (NOT THROUGH AN EMPLOYER) to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
☐	☐	Did you make any withdrawals or receive distributions from a pension or profit-sharing plan, IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
☐	☐	Did you execute any rollovers from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
☐	☐	Did you receive any Social Security benefits during the year?

Education Information

Yes	No	
☐	☐	Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)?
☐	☐	Did anyone in your household attend a post-secondary school during the year?
☐	☐	Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year?
☐	☐	Did you pay student loan interest for yourself, your spouse, or your dependents during the year? If "Yes," provide the amount of interest that was refunded.
☐	☐	Did you receive forgiveness on a qualifying federal student loan?

Foreign Tax Information

Yes	No	
☐	☐	Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?
☐	☐	Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?
☐	☐	Did the aggregate value of your foreign accounts exceed $10,000 at any time during the year?
☐	☐	Did you have any income from, or pay taxes to, a foreign country?
☐	☐	Did you receive a Schedule K-3 from a partnership or S corporation?
☐	☐	Did you have ownership in a foreign corporation at any time during the year?
☐	☐	Did you own property in a foreign country?

Questionnaire

Name: SSN:

Questionnaire

Refund, Withholding, and Estimated Tax Information

Yes	No	
☐	☐	Did you make any estimated payments toward your 2025 taxes?
☐	☐	If you have to pay estimates, do you want them automatically paid on the due dates? (IRS is no longer taking checks)
☐	☐	Did your bank change names in 2025? If "Yes," provide new account and routing numbers.
☐	☐	Do you want to have any refund directly deposited? NOTE: Due to Executive Order 14247, Modernizing Payments to and from America's Banking Account, refunds received by check will be delayed at least six weeks. Direct deposit of refunds is recommended. If "Yes," provide a canceled checking or savings slip.
☐	☐	Do you want any balance due directly withdrawn on the due date of April 15, 2026
☐	☐	Do you anticipate your income or withholdings to be different for 2026?

One Big Beautiful Bill Implications

Yes	No	
☐	☐	Did you receive qualified tips reported on Form W-2 or a statement provided by your employer? If "Yes," provide documentation or amount.
☐	☐	Did you receive overtime pay reported on Form W-2 or a statement provided by your employer? If "Yes," provide documentation or amount.
☐	☐	Did you purchase a new passenger vehicle for personal use during 2025? If "Yes," are the following true:

Yes	No	
☐	☐	The final assembly was in the U.S. during 2025?
☐	☐	The gross vehicle weight is under 14,000 pounds?
☐	☐	The vehicle was not purchased with a lease?
☐	☐	The vehicle was used to secure the loan?

If all are yes provide the vehicle loan interest statement.

Yes	No	
☐	☐	If you have a dependent born during 2025, do you want to establish a Trump Account?

Yes	No	
☐	☐	If "Yes," do you want to receive a $1,000 pilot program contribution?

Miscellaneous Information

Yes	No	
☐	☐	Did you receive, sell, exchange, gift, or otherwise dispose of any digital asset or financial interest in any digital asset? If "Yes," provide any Forms 1099-DA received.
☐	☐	Did you incur a gain or loss due to damaged or stolen property, while living in a federally declared disaster area? If "Yes," provide the incident date, value of the property, amount of insurance reimbursements, and the declaration number assigned by FEMA.
☐	☐	Did you pay wages to any household employees (nanny, housekeeper, etc.)?
☐	☐	Did you make gifts to any one person in excess of $19,000 during the year?
☐	☐	If "Yes," are you splitting the gift with your spouse?
☐	☐	Did you incur moving expenses with the military during the year?
☐	☐	Did you make any energy-efficient improvements to your main home during the year?
☐	☐	Did you receive a cash payment or digital asset of more than $10,000 in one transaction or two or more related transactions during the year?
☐	☐	If "Yes," was Form 8300, Report of Cash Payment over $10,000 Received in Trade or Business, filed?
☐	☐	Do you own interest or shares in or did you dispose of a Qualified Opportunity Fund during the year?
☐	☐	Did you make any purchases subject to use tax during the year? If "Yes," provide details.
☐	☐	Did you receive any notices from the IRS or state taxing authority? If "Yes," explain. _____
☐	☐	May the IRS discuss your tax return with your preparer? (THIS ANSWER IS YES)

Questionnaire

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Questionnaire

Minnesota Information

Yes No

- ☐ ☐ Do you contribute to a 529? If yes, provide details.
- ☐ ☐ Do you want to contribute to the MN Wildlife Fund?
  Amount $_____
- ☐ ☐ Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year?
- ☐ ☐ Do you pay rent? (Provide electronic certified Certificate of Rent Paid)
- ☐ ☐ Do you own your house?
  - ☐ ☐ Did you live in that house on Jan 2, 2026?
  - ☐ ☐ Does anyone other then your spouse or child under 18 live with you?
    If yes, please provide a copy of their 2025 Tax Return.
  - ☐ ☐ Did you use part of your house for a business home office?
  - ☐ ☐ Does anyone in your household receive non-taxable income or financial assistance?
    If yes, indicate amount and type.

    _____

Dependent Information

Yes No

- ☐ ☐ Did you have any changes in dependents during the year?
  If "Yes," explain. _____
- ☐ ☐ Can another person qualify to claim any of your dependents?
  If "Yes" explain_____
- ☐ ☐ Did you have any child or dependent care expenses during the year?
- ☐ ☐ Did you have any adoption expenses during the year?
- ☐ ☐ Did you have any children under age 18 or a full-time student under age 24 with more than $2,700 of unearned income? (Not W2 income).
- ☐ ☐ Did you pay for K-12 school supplies? (Minnesota only) Please Provide Name, Grade & Amount for each kid.
  Child Name _____
  Child Name _____
  Child Name _____
  Child Name _____

Provide documentation for proof of dependent credits (school records, medical records, daycare records, etc.)

Yes No

- ☐ ☐ Are you unmarried and support a household for qualifying person?

  Yes No
  - ☐ ☐ Do you pay for half the cost of the home?
  - ☐ ☐ Are you divorced? If "yes" do you have a:
    - ☐ Divorce decree
    - ☐ Separate maintenance agreement or separation agreement
  - ☐ ☐ Do you have custody of your dependents?
    How many nights did each dependent sleep in your house?

    _____

    _____
  - ☐ ☐ Do your receive any nontaxable support income? (family, food stamps, housin assistance, child support, ect)
  - ☐ ☐ Can you provide documentation the substantiate the cost of maintaining the home (Utilities bill, Property tax bills, Grocery receipts, Rent receipts, mortgage interest, repair bills, other household bills)
  - ☐ ☐ Does any non dependent live in your home? (Adult)
    Name and
    Relationship_____
    - ☐ ☐ Do they provide financial support?

Questionnaire

Name: SSN:

Questionnaire

Notes