

2025 Tax Questions

Please check the appropriate box and include all necessary details and documentation for all items applicable to you for 2025.

Name: _____

Personal Information

Yes **No**

Did your marital status change during the year?

☐ ☐

If yes, explain: _____

Can you be claimed as a dependent by another taxpayer?

☐ ☐

Did you renew your driver license since last year? If yes, provide a copy of the front of your renewed driver license.

☐ ☐

Did you, your spouse, or dependent receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, please provide the IRS letter with the PIN for filing returns for 2025 tax year.

☐ ☐

Dependent Information

Were there any changes in dependents from last year?

☐ ☐

If yes, explain: _____

Do you have any children under age 19 or a full-time student under age 24 with unearned income (eg: investment income from stocks) in excess of \$2,700?

☐ ☐

Do you have dependents who have earned income (eg: wages or tips)?

☐ ☐

If yes to either of above and you would like Seibel & Katz to prepare the return, please provide the documentation so we can prepare the tax return.

Did you provide over half the support for any other person(s) other than your dependent children during the year?

☐ ☐

If yes, explain: _____

Did you pay for childcare while you worked, looked for work, or while a full-time student?

☐ ☐

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?

☐ ☐

Purchases, Sales, and Debt Information

Did you start a new business, purchase real estate, or acquire a new interest in a partnership or S corporation during the year?

☐ ☐

If yes, explain: _____

Did you purchase or sell a principal residence during the year?

☐ ☐

Did you acquire or dispose of any stock during the year?

☐ ☐

Did you take out a home equity loan this year?

☐ ☐

If yes, did you use the loan exclusively for home improvements?

☐ ☐

Did you refinance a principal residence or second home this year?

☐ ☐

Did you sell an existing business, real estate, or other investment besides stock this year?

☐ ☐

If yes, explain: _____

Did you purchase a new or previously owned clean vehicle this year that is eligible for the new clean vehicle credit?

☐ ☐

If yes, did you pay to install a qualified electric car charger?

☐ ☐

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Did you purchase a new U.S. assembled vehicle for personal use this year and take out a loan to purchase it? ☐ ☐

Did you have debt canceled or forgiven this year (eg: home mortgage or student loans)? ☐ ☐

Income Information

Did you receive any investment income such as interest or dividends? ☐ ☐

Did you receive any income from property or investments sold prior to this year? ☐ ☐

Did you receive any unemployment benefits or disability income during the year? ☐ ☐

Did you receive any awards, prizes, hobby income, gambling, or lottery winnings? ☐ ☐

Did you receive any income considered to be nonemployee compensation, such as income earned on a Form 1099-NEC or 1099-MISC? ☐ ☐

Did you have any sales or exchanges of digital assets? ☐ ☐

Did you receive tips 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? ☐ ☐

Do you expect a large fluctuation in income, deductions, or withholding next year? ☐ ☐
If yes, explain: _____

Retirement Information

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 any withdrawals were for a qualified charitable distribution, please provide support.

Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan? ☐ ☐

Education Information

Did you, your spouse, or your dependents attend a post-secondary school this year? ☐ ☐

Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? ☐ ☐

Did you make any withdrawals from an education savings or 529 Plan account? ☐ ☐

If yes, were the withdrawals used exclusively for qualified education expenses? ☐ ☐

Did you make any contributions to an education savings or 529 Plan account? ☐ ☐

Did you pay any student loan interest this year? ☐ ☐

Health Care Information

Did you have qualifying health care coverage for you, your spouse, and dependents? ☐ ☐

Did you enroll for lower cost Marketplace Coverage through healthcare.gov under the Affordable Care Act? If yes, please provide Form 1095-A. ☐ ☐

Did you make any contributions this year to a health savings account (HSA) or Archer MSA? ☐ ☐

Did you receive any distributions this year from a health savings account (HSA) or Archer MSA? ☐ ☐

If yes, were the distributions used exclusively for qualified medical expenses? ☐ ☐

Did you pay long-term care premiums for yourself or your family? ☐ ☐

2025 Tax Questions

Itemized Deduction Information

- | | | |
|--|--------------------------|--------------------------|
| Did you incur a casualty or theft loss or any condemnation awards during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, explain: _____ | | |
| Did you pay out-of-pocket medical expenses outside of amounts paid with withdrawals from an HSA (over 7.5% of your income to be deductible)? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you make any cash or noncash charitable contributions? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay any real estate taxes for your primary home and/or second home? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay any mortgage interest on an existing home loan? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you incur interest expense associated with any investment accounts you held? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you make any out-of-state purchases for which the seller did not collect state sales tax? | <input type="checkbox"/> | <input type="checkbox"/> |

Miscellaneous Information

- | | | |
|--|--------------------------|--------------------------|
| Did you make federal, state, or city estimated tax payments for 2025? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you make gifts of more than \$19,000 to any individual? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you retire or change jobs this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, explain: _____ | | |
| Did you pay an individual as a household employee during the year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you make energy efficient improvements to your main home this year? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive a distribution from, or were you a grantor or transferor for a foreign trust? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you have a financial interest in or a signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country? | <input type="checkbox"/> | <input type="checkbox"/> |
| Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity? | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive correspondence from any IRS, state, or city tax authority? | <input type="checkbox"/> | <input type="checkbox"/> |
| If yes, provide copies if haven't already or explain: _____ | | |
| 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. | <input type="checkbox"/> | <input type="checkbox"/> |

Other information we should know: