

CLIENT QUESTIONNAIRE

******ALL QUESTIONS MUST BE ANSWERED!!******

NAME:

CLIENT DRIVER'S LICENSE INFO: LICENSE #, State of Issuance, Issue Date and Expiration Date		
SPOUSE'S DRIVER'S LICENSE INFO: License #, State of Issuance, Issue Date and Expiration Date		
	YES NO	COMMENTS
Did you get married or divorced during 2025?	☐ ☐	
Do you have an interest in any foreign accounts or trusts?	☐ ☐	
At any time during 2025, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?	☐ ☐	
Do you need to add or remove any dependents in 2025? If so, provide the details. (IE: birth cert, soc sec card, etc.)	☐ ☐	
Did anyone attend college during 2025? If so, please complete the Education Worksheet .	☐ ☐	
Did you pay for child care in 2025 so both spouses could be employees or self-employed. If so, complete the Child Care Worksheet .	☐ ☐	
Did you or a family member (taxpayer, spouse and dependents) enroll in health insurance coverage for 2025 through the Health Insurance Marketplace (Exchange)? If YES , please provide a copy of Form 1095-A . Please contact your health insurance provider if you have not received your 1095-A for 2025.	☐ ☐	
Did you contribute to a Health Savings Account (HSA)? If so, please provide the total amount you and/or your spouse contributed (do not include contributions made by your employer on your behalf through your payroll) for 2025.	☐ ☐	
If you did make HSA contributions, was the health insurance policy an individual or family plan?		
Do you want to make an HSA contribution prior to filing the 2025 tax return (can be made until 4/15/26 for the 2025 tax year)? If so, how much?	☐ ☐	
Did you withdraw money from an HSA? If so, include all 1099-SA's	☐ ☐	
Were all funds withdrawn used for qualified medical expenses?	☐ ☐	
Did you make any estimated tax payments (in addition to withholding from your wages) to the IRS or State for 2025 (including 4th quarter payments due in January 2026)?	☐ ☐	
If so, provide date and dollar amount paid.		
1st Quarter		
2nd Quarter		
3rd Quarter		
4th Quarter		
If you have a refund on your return, how do you want to receive it?		
Direct Deposit (quickest method)	☐ ☐	
Applied to 2026 estimated taxes	☐ ☐	
Direct deposit, please provide the following: (even if we already have it)		
- Bank Routing Number		
- Bank Account Number		
- Bank Name		
- Is the bank account a checking account	☐ ☐	
- Is the bank account a savings account	☐ ☐	