NEXT LEVEL
Accounting & Tax PC
Bringing Your Business to the Next Level

2025 Individual Questionnaire

Taxpayer				Tax ID # *	
First Name	*M.I.*	*Last Name*	Email		IP PIN
Occupation		Date of birth		Are you new to our firm? Yes No	
Address		City		State	Zip
County		Primary phone		Secondary phone	
Driver's License *No.*			*State*	*Issue Date*	*Exp. Date*

Spouse				Tax ID # *	
First Name	*M.I.*	*Last Name*	Email		IP PIN
Occupation		Date of birth		Are you new to our firm? Yes No	
Address *(If different from Taxpayer)*		City		State	Zip
County		Primary phone		Secondary phone	
Driver's License *No.*			*State*	*Issue Date*	*Exp. Date*

If you moved during 2025, enter your previous address.	Date of move

Marital status on 12/31/25: Single Married Separated Surviving Spouse Registered Domestic Partnership (RDP)

Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No

Note: Individuals in registered domestic partnerships (RDPs) and civil unions are not considered married for federal tax purposes.

Names of dependent children *Child's full name*	*Tax ID # **	*IP PIN*	*Date of birth*	*Months lived in home in 2025*	*Relationship*	*College student?*

Did any of the children have unearned income of $1,350 or more? Yes No Do any of the children have a disability? Yes No

Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2025? Yes No

Other dependents or people who lived with you

Name	*Tax ID # **	*IP PIN*	*Date of birth*	*Months lived in home in 2025*	*Relationship*	*Income*

Bank information: Use for Direct deposit of refund Direct debit of balance due *Name of bank*

Checking *Savings*	*Routing transit number*	*Account number*

Ask your tax preparer for information about depositing a refund into an IRA account or splitting the deposit into more than one account.

*A Tax ID # is a Social Security Number (SSN), adoption taxpayer identification number (ATIN), or an individual taxpayer identification number (ITIN).

Questions — All Taxpayers

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse—ask your preparer if you are unsure about a question.

LIFESTYLE & TAXES	Yes	No	Are either you or your spouse legally blind?		
	Yes	No	Have you received any notice from the IRS or state revenue department within the past year? If yes, provide a copy.		
	Yes	No	Did you pay or receive alimony in 2025? *Paid* *Received* $	*Recipient's SSN*	*Date of divorce or separation*
	Yes	No	Did you purchase health insurance through a public exchange/marketplace? (Provide Form 1095-A.)		
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?		
	Yes	No	Did you pay anyone for domestic services (e.g., nanny, housekeeper, cook, caretaker) in your home?		
	Yes	No	Did you purchase an energy-efficient, hybrid, or electric vehicle?		
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?		
	Yes	No	Are you a member of the military?	State of residency	
	Yes	No	Were you a citizen of or did you live in a foreign country?	Foreign country	
	Yes	No	Do you own or have financial interest in a foreign bank or financial account? *Maximum value in 2025* $		
	Yes	No	Would you like to allow your tax preparer or another person to discuss your return with the IRS? *Designee's name* *Phone number* *PIN (any five digits)*		
CHILDREN & EDUCATION	Yes	No	Were any children born or adopted in 2025? *(Provide statement for other expenses.)*		
	Yes	No	Were any children attending college? *(Provide Form 1098-T and Form 1098-E.)*		
			Year in college	Paid by you: *Tuition* $	*Books* $ / *Student loan interest* $
				Paid by student: *Tuition* $	*Books* $ / *Student loan interest* $
	Yes	No	Did you pay for child or dependent care so you could work or go to school? *(Provide statement if applicable)*		
			Name of provider		*EIN or SSN*
			Address		*Amount paid* $
	Yes	No	Did you contribute to or take money from a 529 plan in 2025? If yes, provide details.		
INVESTMENTS	Yes	No	Did you, or will you, contribute any money to an IRA for 2025?	Traditional IRA	Roth IRA
	Yes	No	Did you roll over any amounts from a retirement account in 2025?		
	Yes	No	Did you sell or transfer any stock or sell rental or investment property?		
	Yes	No	Did you receive any income from an installment sale?		
	Yes	No	Did you have any investments become worthless or were you a victim of investment theft in 2025?		
	Yes	No	Were you granted, or did you exercise, any employee stock options during 2025?		
	Yes	No	Did you (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? *(Digital assets include cryptocurrencies, NFTs, and stablecoins)*		
DEDUCTIONS	Yes	No	Did you, or do you plan to, contribute money by April 15, 2026 to an HSA for 2025? If yes, provide details.		
	Yes	No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.		
	Yes	No	Did you pay sales taxes on a major purchase in 2025, such as a vehicle, boat, or home?		
	Yes	No	Did you make any charitable contributions in 2025? If yes, provide details.		
	Yes	No	Did you pay interest on a loan for a new vehicle purchased after 2024? If yes, provide details.		
	Yes	No	Did you receive tip income? If yes, provide details.		
	Yes	No	Did you receive overtime pay? If yes, provide earnings records and/or paystubs.		
BUSINESS	Yes	No	Did you work from a home office or use your car for your business?		
	Yes	No	Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)?		
	Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture?		
HOME	Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement.		
	Yes	No	Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement.		
	Yes	No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?		
	Yes	No	Did you make any new energy-efficient improvements to your home? If yes, provide details.		

State information	Full-year resident	Part-year resident	Nonresident	School district
States of residence during 2025 and dates				Do you rent or own your home? Rent Own
				Total rent paid $ Includes heat? Yes No

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the returns carefully before signing to make sure the information is correct.
- Fees must be paid before your tax returns are delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer may be required for preparation of returns.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a duplicate copy in the future.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities. For a joint return, both taxpayers must sign.

Taxpayer	*Spouse*	*Date*

Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your express written permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.