



2025 TAX CHECKLIST & QUESTIONNAIRE

☐ I am a returning client. All names, SSN, DOB, etc. (all shaded areas) stayed the same in 2025.

Primary Taxpayer:			
Name (First Middle Last):	SSN:	DOB:	Occupation:
Secondary Taxpayer:			
Street Address:	City:	Zip Code:	School District:
Did you move or change your address during 2025? <input type="checkbox"/> Yes Date of Move: _____			
Primary Phone No.:	Can you receive texts?	Primary Email Address:	
	<input type="checkbox"/> Yes		
Secondary Phone No.:	Can you receive texts?	Secondary Email Address:	
	<input type="checkbox"/> Yes		

Proof of identity is required such as a driver's license or state-issued photo ID to e-file.

Expected Filing Status for 2025:	Other Information:	Primary Taxpayer:	Secondary Taxpayer:
<input type="checkbox"/> Single (S)	Are you blind or disabled?	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> Married Filing Jointly (MFJ)	Contribute \$3 Election fund?	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> Married Filing Separately (MFS)	Are you a full-time student?	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> Qualifying Surviving Spouse (QSS)	Did you file taxes in 2024?	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
<input type="checkbox"/> Head of Household (HOH)			

Did you change your marital status due to divorce, separation, death of a spouse, etc. in 2025? ☐ Yes

Can you or your spouse be claimed as a dependent on someone else's tax return? ☐ Yes

If so, have you or your spouse been claimed as a dependent on someone else's tax return? ☐ Yes

Are you completing this return on behalf of someone else (child, elderly parent, etc.) ☐ Yes

Were you, your spouse, or any dependents ever a victim of identity theft? ☐ Yes

Were you, your spouse, or any dependents ever been a victim of identity theft or have been issued an IRS 6-digit Identity Protection PIN (IP PIN)? ☐ Yes

If "Yes," please provide the IRS Notice CP01A that you received for each affected party annually.



*** New for 2025 *** As of 10/30/2025, the IRS will no longer issue paper checks for tax refunds.
Please provide **VOIDED CHECK** or deposit slip from your financial institution.

Have you ever amended your federal income tax return? ☐ Yes

Have you ever been audited or received any correspondence by the IRS? ☐ Yes

Have you ever been delinquent in paying your taxes or ever modified your tax return after it was filed? ☐ Yes

Did you or your spouse make or receive gifts of over \$19,000 in 2025? ☐ Yes

DEPENDENT / QUALIFIED CHILDREN:

Name:	SSN:	Age:	Birthdate:	Age:	Relationship:	Mos. In Home:	College Student:	Gross Income:
							Yes	
							Yes	
							Yes	
							Yes	

***** New for 2025 *** Trump Accounts**

I wish to establish a **Trump Account** (please research) for my eligible child born in 2025. ☐ Yes

Do you alternate claiming a non-custodial child every-other-year on your tax return, do you have an IRS Form 8332 – Release of Claim of Exemption of Child by Custodial Parent signed and on file. ☐ Yes

Can another person QUALIFY to claim any of your dependents in 2025? ☐ Yes

Did you pay any qualified childcare expenses to a licensed daycare provider during 2025? ☐ Yes

Did you provide over half the support for any other person during 2025? ☐ Yes

Do you have dependent care covered through work or through an employee contribution program? ☐ Yes

Do you have any dependent children who must file a 2025 federal or state income tax return? ☐ Yes

As a courtesy, dependent children's tax returns (up to two W-2s) are prepared free of charge.

TAXABLE INCOME: (Please check "✓" all that apply)

Please note, all income is taxable unless specifically exempt under federal tax law.

- | | |
|--|--|
| <input type="checkbox"/> Wages, salary, tips, etc. (W-2s) | <input type="checkbox"/> Sale or transaction of any crypto, digital or virtual currency |
| <input type="checkbox"/> Disability income (W-2) | <input type="checkbox"/> Foreign income or taxable investments |
| <input type="checkbox"/> Tips <u>not</u> reported on W-2s | <input type="checkbox"/> Maintain foreign accounts or transactions |
| <input type="checkbox"/> Lyft, Uber, Airbnb, VRBO, etc. (1099-K or NEC) | <input type="checkbox"/> Business or hobby income / loss (Schedule C) |
| <input type="checkbox"/> Taxable Interest (1099-INT, Bank Statements) | <input type="checkbox"/> Gains on investments, land, etc. (1099-COMP) |
| <input type="checkbox"/> Dividend income (1099-DIV) | <input type="checkbox"/> Rental property income (Schedule E) |
| <input type="checkbox"/> IRA withdrawal, rollover, or transfer (1099-R) | <input type="checkbox"/> Partnership income (K-1) |
| <input type="checkbox"/> Pension income (1099-R) | <input type="checkbox"/> Estate or trustee income (K-1) |
| <input type="checkbox"/> Annuity income, payments, or transfer (1099-R) | <input type="checkbox"/> Unemployment Compensation (1099-G) |
| <input type="checkbox"/> Social Security Benefits (1099-SSA) | <input type="checkbox"/> Gambling / lottery winnings (W-2G) |
| <input type="checkbox"/> Cancellation of debts (1099-C) | <input type="checkbox"/> Distributions from education accounts (1099-Q) |
| <input type="checkbox"/> Non-employee compensation (1099-NEC) | <input type="checkbox"/> Jury Duty income |
| <input type="checkbox"/> Home or real estate sale (1099-S) | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Taxable scholarship(s) | |

ADJUSTMENTS TO INCOME / Tax: (Please check "✓" yes or no to each question)

*** New for 2025 ***

Did you earn income from tips **OR** overtime in 2025? ☐ Yes

If "Yes", please provide a copy of your 12/31/25 check stub from your employer.

Did you purchase a new vehicle assembled in the US and pay loan interest on said vehicle in 2025? ☐ Yes

If "Yes", please provide details from your loan provider.

Did you own a Health Savings Account (**1099-SA**) individually or through work? ☐ Yes

Did you move as a member of the Armed Forces in 2025 (**Moving Expense Deduction**)? ☐ Yes

Did you withdraw funds from an IRA, 401(k), etc. prior to 59½ (**Early Withdrawal Penalty**)? ☐ Yes

Did you contribute to an Individual Retirement Account (**IRA**) in 2025? ☐ Yes

If "Yes", amount contributed: Taxpayer: _____ 2nd Taxpayer: _____

Did you contribute to a Roth Individual Retirement Account (**Roth IRA**) in 2025? ☐ Yes

If "Yes", amount contributed: Taxpayer: _____ 2nd Taxpayer: _____

Did you pay interest on a student loan (**Student Loan Interest Deduction**)? ☐ Yes

Did you receive a Health Insurance Marketplace Statement (**1095-A**) in 2025? ☐ Yes

Did you pay estimated taxes in 2025? ☐ Yes

If yes, amount paid: **1st Quarter:** Fed: _____ St: _____

2nd Quarter: Fed: _____ St: _____

3rd Quarter: Fed: _____ St: _____

4th Quarter: Fed: _____ St: _____

Did you make a Qualified Charitable Distribution (**QCD**) in 2025? ☐ Yes

If yes, amount of **QCD**: _____ From which financial institution did the QCD occur? _____

ITEMIZED TAX DEDUCTIONS: (Please check "✓" all that apply)

Please note, the standard deduction for 2025 is \$15,750 for single filers and \$31,500 for joint filers under age 65. Your deductions must exceed that amount to itemize.

☐ Medical and Dental Expenses (> 7.5% AGI) _____ ☐ Real Estate Property Taxes _____

☐ Health Insurance / Medicare _____ ☐ Home Mortgage Interest / Points Paid _____

☐ Long-Term Care Insurance _____ ☐ Mortgage Insurance _____

☐ State and Local Taxes _____ ☐ Donations to Charity (**Documented**) _____

☐ New Motor Vehicle or Boat Sale Tax _____ ☐ Casualty or Theft Losses _____

☐ Documented gambling losses _____ ☐ Other: _____

Did you itemize your tax deductions last year? ☐ Yes ☐ No

Did you install a geothermal, solar, or wind energy system to your primary residence in 2025? ☐ Yes

Did you make energy efficiency improvements to your primary residence in 2025? ☐ Yes

Did you adopt a child in 2025 or have adoption credit carried over from 2024? ☐ Yes

Did you pay tuition and fees for you, your spouse or dependent child's education in 2025? ☐ Yes

Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country? ☐ Yes

Did you pay any foreign income or investment tax? ☐ Yes

2027 TAX PLANNING: (Please check "✓" yes or no to each question)

- Do you expect your income, withholdings or other financials to change in 2026? ☐ Yes
- Will you file bankruptcy, have any lender forgive / cancel debts (credit cards, loans, etc.) in 2026? ☐ Yes
- Do you and / or your spouse plan to retire or have significant life / income changes in 2026? ☐ Yes
- Do you expect to undergo any major-medical expenses in 2026? ☐ Yes
- Do you expect to file bankruptcy, foreclose, or have any debt forgiven or cancelled in 2026? ☐ Yes
- Will any dependent children turn 17 and **NOT** be entering college or vocational school in 2026? ☐ Yes
- Will you turn 73 prior to December 31st of 2026? (RMD) ☐ Yes

REQUIRED DOCUMENTATION / FOLLOW-UP NEEDED TO COMPLETE YOUR 2025 TAX RETURNS:

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

NOTES:

WISCONSIN

TAX CHECKLIST & QUESTIONNAIRE

WI STATE RETURN: (Please check "✓" yes or no to each question)

Have you ever amended your Wisconsin State Income Tax Return? ☐ Yes

Did you move to Wisconsin and were a part year resident of Wisconsin in 2025? ☐ Yes

If so, state of prior residency? _____

Date of move to Wisconsin? _____

Did you receive **ANY** income from **ANY** state other than Wisconsin in 2025? ☐ Yes

Did you pay income tax or have tax withholdings from any another state other than Wisconsin in 2025? ☐ Yes

Did you purchase / renew a Wisconsin special tax-deductible license plate in 2025? ☐ Yes

Did you purchase (through internet, etc.) items where Wisconsin sales tax is due but not paid? ☐ Yes

Homestead / Property Tax Credit:

Did you **PAY** (actual amount paid) Wisconsin state property tax in 2025? ☐ Yes

Did you pay Wisconsin state property tax for anyone other than yourself in 2025? ☐ Yes

Did you pay rent in 2025? ☐ Yes

Amount paid **WITH** heat included: _____

Amount paid with heat **NOT** included: _____

Did you share your rent or expenses with any other person in 2025? ☐ Yes

Did you receive the Wisconsin Homestead Credit in 2024 or expect to receive the credit in 2025? ☐ Yes

Did you or are you living in a nursing home or assisted living facility in 2025? ☐ Yes

Did you receive Wisconsin Works, county relief, kinship care or other public assistance in 2025? ☐ Yes

Wisconsin Schedule SB – Common subtractions from income:

Did you receive US Government Bond interest? ☐ Yes

Did you receive interest income from Wisconsin Tax Exempt Municipal Bonds? ☐ Yes

Did you pay out-of-pocket non-reimbursed medical care, dental, vision insurance premiums or Medicare, Medicare Advantage, Prescription Drug insurance premiums in 2025? ☐ Yes

Did you pay out-of-pocket Long-Term Care Insurance premiums in 2025? ☐ Yes

Did you pay in-state college tuition for yourself or a dependent in 2025? ☐ Yes

Did you contribute to Wisconsin's 529 College Savings Program (Tomorrow's Scholar or EdVest) in 2025? ☐ Yes

Did you pay in-state private tuition (K – 12) for a dependent child in 2025? ☐ Yes

Did you establish or contribute to an ABLE account in 2025? ☐ Yes

Did you receive tribal income **AND** lived on tribal land in 2025? ☐ Yes

Did you receive a Schedule 5K-1 showing Wisconsin adjustments to an LLC, Trust, Estate or S-Corp? ☐ Yes

Do you qualify for the Farmland Preservation Credit? ☐ Yes

Military / Reservists / Retired Military Veterans:

Do you qualify for the Eligible Veterans and Surviving Spouses Property Tax Credit? ☐ Yes

Did you receive military retirement benefits (from DFAS) in 2025? ☐ Yes

Did you receive active military pay in 2025? ☐ Yes