



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) <input type="checkbox"/> Married Filing Jointly (MFJ) <input type="checkbox"/> Married Filing Separately (MFS) <input type="checkbox"/> Qualifying Surviving Spouse (QSS) <input type="checkbox"/> Head of Household (HOH)	Are you blind or disabled? Contribute \$3 Election fund? Are you a full-time student? Did you file taxes in 2024?	<input type="checkbox"/> Yes <input type="checkbox"/> Yes <input type="checkbox"/> Yes <input type="checkbox"/> Yes	<input type="checkbox"/> Yes <input type="checkbox"/> Yes <input type="checkbox"/> Yes <input type="checkbox"/> Yes

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.

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

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.

<input type="checkbox"/> Medical and Dental Expenses (> 7.5% AGI) _____	<input type="checkbox"/> Real Estate Property Taxes _____
<input type="checkbox"/> Health Insurance / Medicare _____	<input type="checkbox"/> Home Mortgage Interest / Points Paid _____
<input type="checkbox"/> Long-Term Care Insurance _____	<input type="checkbox"/> Mortgage Insurance _____
<input type="checkbox"/> State and Local Taxes _____	<input type="checkbox"/> Donations to Charity (Documented) _____
<input type="checkbox"/> New Motor Vehicle or Boat Sale Tax _____	<input type="checkbox"/> Casualty or Theft Losses _____
<input type="checkbox"/> Documented gambling losses _____	<input type="checkbox"/> 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