St. Louis Park Tax & Accounting CPA
Accounting Firm & Business Advisor

2025 TAX RETURN QUESTIONNAIRE

Taxpayer Name: _____

Social Sec. # _____ ***DOB:*** _____ ***Occupation:*** _____

Home/Cell # _____ ***Email:*** _____

Spouse Name: _____

Social Sec. # _____ ***DOB:*** _____ ***Occupation:*** _____

Home/Cell # _____ ***Email:*** _____

Mailing Address: _____

City: _____ ***State:*** _____ ***Zip Code:*** _____

Filing Status: Single ☐ ***Married*** ☐ ***Head of Household*** ☐ ***Qualifying Widow*** ☐

Dependents

Do you have the <u>LEGAL RIGHT</u> to claim?

Name	*DOB*	*Social Sec. #*	*Relationship*	*Months lived with you*

<u>IF WE HAVE NOT PREPARED YOUR PREVIOUS YEAR'S TAXES, PROVIDE YOUR PRIOR TAX RETURN.</u>

<u>PLEASE PROVIDE INCOME DOCUMENTS FOR ALL APPLICABLE ITEMS</u>

- ***Wages and Salaries: W-2's***
- ***Rents/Royalties Partnerships, S Corps, Estates, Trusts: Provide K-1***
- ***Business Income: 1099-NEC, Profit and Loss Statement and Balance Sheet***
- ***Retirement Income: 1099-SSA 1099-R***
- ***Unemployment or State Refund: 1099-G***
- ***Dividend and Interest: 1099-DIV 1099-INT***
- ***Stocks/Capital Gains: 1099-B or other***
- ***Other Income: Awards, Gambling, W-2G Cancellation of Debt, Foreign Income 1099-MISC 1099-S 1099-PATR 1099-K***

Please select the appropriate box and include all necessary details and documentation.

<u>Income</u>

Did you sell any stock? Did you have any dividends? Provide 1099-B or 1099-Div *Yes* ☐ *No* ☐

Did you sell a home, vacation home, or any other properties such as vehicles? *Yes* ☐ *No* ☐

Did you receive any unemployment benefits during the year? *Yes* ☐ *No* ☐

Did you receive any disability income during the year? *Yes* ☐ *No* ☐

Did any of your life insurance policies mature, or did you surrender any polices? *Yes* ☐ *No* ☐

Did you receive any awards, prizes, hobby income, gambling or lottery winnings? *Yes* ☐ *No* ☐

Did you receive any income through a business and receive a K-1? Yes ☐ No ☐

Did you work any overtime or have tip income? Check W-2 Yes ☐ No ☐

Did you have any sales or other exchanges of digital assets/virtual currencies? Yes ☐ No ☐

Did you have any foreign income or pay any foreign taxes during the year, directly or indirectly, such as from investment accounts, partnerships or a foreign employer? Yes ☐ No ☐

Did you receive/pay alimony? Provide name, SSN, and amount. Yes ☐ No ☐
Name: _____ SSN: _____ $ _____

Retirement

Did you receive any Social Security benefits this year? Yes ☐ No ☐

*Did you make any **withdrawals** from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?* Yes ☐ No ☐

*Did you make any **contributions** to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan **outside of your employer**?* Yes ☐ No ☐

Did you receive any lump-sum payments from a pension, profit sharing or 401(k) plan? Yes ☐ No ☐

Did you make any qualified charitable distributions (QCD) from a retirement plan during the year? Provide 1099-R Yes ☐ No ☐

Dependents

Do you have dependents who must file a tax return? Yes ☐ No ☐

Do you have any children under age 19 or a full-time student under the age of 24 with unearned income in excess of $2,700? Yes ☐ No ☐

Did you provide over half the support for any other person(s) other than your dependent children during the year? Yes ☐ No ☐

Did you pay any expenses related to the adoption of a child during the year? Yes ☐ No ☐

Did you have dependent care expenses? (Daycare) Yes ☐ No ☐
Provide information below: EIN or SSN and amount paid.
EIN: _____ SSN: _____ $ _____

Education

Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? Provide 1098-T and receipts for qualified tuition and related expenses. Yes ☐ No ☐

Did you, your spouse, or your dependents attend a post-secondary school during the year? Yes ☐ No ☐

Did you pay any student loan interest this year? Provide 1098 Yes ☐ No ☐

Did anyone in your family receive a scholarship of any kind during the year? Yes ☐ No ☐
If yes, were any of the scholarship funds used for expenses other than tuition, Such as room and board? Yes ☐ No ☐

*Did you make any **withdrawals** from an education savings or 529 Plan account?* Yes ☐ No ☐
If yes, were any withdrawals rolled over into an ABLE (Achieving a Better Life Experience) or Roth IRA account? Provide 1099-Q Yes ☐ No ☐

*Did you make any **contributions** to an education savings account or 529 Plan?* Yes ☐ No ☐
Provide amount of contributions and SSN for each individual: $_____

Did you make any private school tuition payments? What grade is the dependent? Yes ☐ No ☐
Provide School _____ Amount $ _____

Health Care

Did you enroll in Marketplace Coverage through the Affordable Care Act? Provide 1095-A Yes ☐ No ☐

*Did you make **contributions** to a Health Savings Account (HSA) **outside of employment**?* Yes ☐ No ☐

*Did you receive any **distributions** from a HSA, MSA, or Medicare Advantage this year?* Yes ☐ No ☐

Did you pay long-term care premiums for yourself or your family? Yes ☐ No ☐

Did you pay any supplemental health insurance? Yes ☐ No ☐

Itemized Deductions

Did you pay out-of-pocket medical expenses (Co-pays, prescriptions drugs, etc.)? Yes ☐ No ☐

Did you pay real estate taxes for your primary home and/or second home? Yes ☐ No ☐

Did you pay rent for living quarters? Was heat included? Amount_____ Yes ☐ No ☐

Did you pay any mortgage interest on an existing home loan? Yes ☐ No ☐

Did you make any cash or non-cash charitable contributions (i.e. clothes or vehicles)? Yes ☐ No ☐

Did you incur casualty, theft, or gambling losses during the year? Yes ☐ No ☐

Did you make any out-of-state purchases (by telephone, internet, mail, or in person) for which the seller did not collect State sales or use tax? Yes ☐ No ☐

Miscellaneous

*Did you receive an **Identity Protection Pin** from the IRS?* Yes ☐ No ☐

Did you start a NEW auto loan after 12/31/24 with qualifying loan interest? Yes ☐ No ☐

Did you make any gifts of more than $19,000 to any individual or 529 plan? Yes ☐ No ☐

Did you utilize an area of your home for business purposes? Yes ☐ No ☐

Did you make any energy efficient improvements to your main home this year? *Yes* ☐ *No* ☐

Did you pay any household employee in the excess of$2,800 during the year? *Yes* ☐ *No* ☐

Did you incur moving costs because of permanent change of station as a member of The Armed Forces on active duty? *Yes* ☐ *No* ☐

Do you have previous years of tax returns that are either unfiled or filed with unpaid balances due? *Yes* ☐ *No* ☐

Estimated Payments, Income Tax Refund or Amount Due

Did you make Estimated Payments for the year ended 2025? *Yes* ☐ *No* ☐

Do you wish to receive your refund electronically? *Yes* ☐ *No* ☐

Do you wish to pay your balance due electronically? *Yes* ☐ *No* ☐

Bank Information

Routing Number	***Name of Bank***	***Checking only Account Number***	***Date of Payment (if applicable)***
_____	_____	_____	_____

I verify that all the above information is accurate

Taxpayer Signature: _____

Spouse Signature: _____

Please provide any relevant tax information, along with any facts or circumstances we should be aware of to accurately prepare your tax return. Feel free to include any questions you may have.