

2025 INCOME TAX QUESTIONNAIRE

Please answer each question as accurately as possible. The information you provide will help ensure the accuracy of your tax returns, thereby reducing the likelihood of audits, interest and penalties, and will assist in ensuring that you receive all deductions for which you are qualified.

Taxpayer Name

Spouse Name

Taxpayer Email

Spouse Email

Street Address/City/State/Zip Code

Phone #

Resident of: IL MO _____

I/we would like to sign electronically YES

Yes No GENERAL

- Have you had a change in filing status since last year?
If yes, please explain_____
- Has your address changed from the one shown on last year's return?
- Is your social security number correct on all forms?
- Did you make any estimated payments? If so, provide details
- Do you have signature authority on a foreign bank account worth \$10,000 or more?
- Did you have any foreign income, not reported on 1099s?
- Are you an elementary or high school teacher? (if yes, provide cost of classroom expenses)
- Would you like direct deposit of your 2025 refund if applicable?
- Would you like to have any balance due for 2025 directly withdrawn from your bank account?
- Did you have any debt cancelled in 2025? If so, please provide 1099-C form
- Were you issued an e-file PIN by the IRS? If so, please provide
- Do you have health insurance through the marketplace (Obamacare)? If so, please provide form 1095-A with the details of premiums and credits
- Did you receive a 1099-K for 2025? If so, please provide information
- Did you purchase a new or used electric or hybrid vehicle prior to 9/30/25? If so, please provide bill of sale including VIN, date of purchase and vehicle model. Dealership should have provided form for taxes
- Did you install solar panels, geothermal HVAC, exterior doors, or windows? If so, provide receipt and manufacturers PIN for your purchase in order to claim any credits

(OVER)

Yes No DEPENDENTS

- [] [] Have you had a change in dependents since last year? If so, provide information
- [] [] Did any dependents under 24 have income? If so, provide information
- [] [] Did you pay over \$250 in education expenses to a private Illinois K-12 School?
- [] [] Did you pay into a college savings plan (Section 529 plan)?
- [] [] Did you withdraw from a college savings plan or sell EE bonds to pay college tuition?
- [] [] Did you or a dependent pay college expenses (tuition, books, fees)?
- [] [] Could you be claimed as a dependent by another taxpayer?
- [] [] Did you pay for childcare while you worked or looked for work? If so, provide details
- [] [] If you have a dependent born in 2025, do you wish to establish a Trump account?

Please list all dependents you can claim on your 2025 return

Yes No INCOME

- [] [] Are the figures on your W-2 and 1099 forms correct or reasonable?
- [] [] Did you change employers last year?
- [] [] Do you have any income not reported on W-2 or 1099? If so, provide details
- [] [] Did you engage in bartering/trading of goods or services during the year?
- [] [] Did you receive any court awards during the year?
- [] [] Did you receive alimony during the year? Date of divorce decree _____
- [] [] Did you receive any unemployment benefits during 2025?
- [] [] Did you receive any social security benefits or disability income in 2025?
- [] [] Did you work in another state? If yes, list the states
- [] [] Did you live or work in the City of St Louis?
- [] [] Have you/will you contribute to a personal IRA account? If so, provide type and amount
- [] [] Did you make charitable contributions from your IRA account? If so, provide details
- [] [] Did you receive distributions from a retirement plan/IRA in 2025?
- [] [] Did you rollover money from a traditional IRA to a ROTH IRA in 2025?
- [] [] Have you ever made non-deductible traditional IRA contributions in the past?
If yes, please provide details – if we don't already have that information
- [] [] Did you receive any trustee fees, executor fees or jury duty pay?
- [] [] Do you expect your 2026 taxable income or withholding to substantially change?

(Please proceed to page 3)

Yes No DEDUCTIONS

- Did you purchase, sell or refinance your principle or second home or HELOC?
- Did you participate in a health savings account (HSA)? If so, provide 1099-SA
- Did you pay any medical or long-term health care insurance premiums?
- Did you make any charitable contributions or donate anything non-cash?
- Did you pay any student loan interest? If yes, provide 1098-E
- Did you pay any mortgage interest? If yes, provide 1098 forms
- Did you pay any real estate taxes on property in 2025?

Yes No INVESTMENTS/BUSINESS

- Did you sell any stocks, bonds or real estate in 2025? Provide documentation
- Have you been notified that any of your stocks are worthless?
- Did you receive any income exempt from federal tax?
- Did you pay a penalty on early withdrawal from a CD?
- Are you invested in any registered tax shelters?
- Did you participate in the operation of any partnerships, corporations, LLCs or rental property for which you are reporting any income or a loss?
- Did you have any business bad debts?
- Did you keep a mileage log on any vehicle you used for business or income producing property? If so, provide details

Yes No OTHER

- Did you or your spouse make any gifts to any individual that total more than \$19,000?
- Did you make any gifts or contributions to a trust?
- Did your bank account information change in the last year?
- Did you receive, buy, sell or dispose of any digital currency or assets?
- Do you or your spouse have an ownership interest in an LLC?
- Does your 2025 W-2 include qualified tips?
- Does your 2025 W-2 include overtime pay? If so, provide information on qualified amount
- Did you finance a new vehicle purchased in 2025? If so provide details of interest paid. If yes provide the following:

Yes No

- Was the vehicle assembled in US?
- Was the vehicle used to secure the loan?
- Was the vehicle used in any business capacity?

(OVER)

IRS has been directed to pay out refunds electronically as soon as deemed feasible. We believe there will be a 12 – 24 month phase in period before Executive Order 14247, Modernizing Payments to and from America's Banking Account is mandated. The same is the case for payments to IRS, they are also directed to receive payments electronically as soon as it is feasible. This includes any amount due upon filing and estimated payments. We can set those to pay electronically when we file, OR you can set up an account with IRS and Illinois to initiate payments there.

For direct deposit or withdrawal purposes please provide the following information:

Bank Name	Routing #	Account #	<input type="checkbox"/> Checking	<input type="checkbox"/> Savings
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If you believe you may qualify for the earned income credit, please ask for the EIC Questionnaire. We cannot complete any return that claims the credit without the questionnaire being completely filled out.

If you believe you may qualify for the Illinois Real Estate Assessment Freeze (over age 65) form P-TAX 340 and your total income is **expected to be below \$75,000** for 2025 check here []

WE MUST HAVE THE FOLLOWING IF THEY APPLY:

Form W-2 and 1099-INT statements – **including information on qualified tips and overtime**

If you directed IRA distributions directly to a charity, please provide details

Form 5498 or year-end statement from all IRA accounts showing the year end values

1099-DA for the sale or exchange of digital assets (cryptocurrency)

1099-K form if you sold anything online and received payments of more than \$20,000

1099-G from the state for any unemployment compensation received

1098-E if you paid student loan interest

Brokerage year-end tax packet including the 1099 with securities sales and cost basis

Printouts or ledgers if you bought or sold digital currency or digital assets

Closing statements if you sold any real estate – along with purchase information

Health Savings Account statements showing contributions or distributions

1098-T tuition statement from college or university and receipts for any other deductible expenses

Form **1095-A** if you have health insurance through the government exchange

Signature of person completing this form

Date