

2025 Income Tax Questionnaire

1. Did you make any charitable gifts in 2025? Please provide evidence of gift(s).
2. Did you make a qualified charitable distribution from an IRA in 2025? If so, from which account, how much, and to what charity? Was it directly distributed to the charity from the IRA?
3. Did you make a gift to an eligible scholarship granting organization (SGO) (typically a private, parochial school) in 2025? If so, please provide the name of the organization and the amount of the gift.
4. Did you pay Long Term Care insurance premiums in 2025? If so, how much?
5. Did you receive a notice from the IRS, Ohio, or local taxing authority regarding your 2024 income tax returns? If so, please include the notice with your tax information.
6. Did you buy or sell cryptocurrencies in 2025? If so, please include evidence of the purchases and sales with your tax documents?
7. Do you have a Shared Custody Arrangement due to divorce? If so, who claims the child(ren) based on the Divorce Decree?
8. Did you pay for child care in 2025? If so, how much and to whom?
9. Did you purchase Health Insurance through Healthcare.gov, (Health Insurance Marketplace)? If so, include Form 1095-A with your tax documents.
10. Did you make a contribution to an IRA (traditional or Roth) in 2025? Please provide amount(s) contributed.
11. Did you make a contribution from your wages to a Health Savings Account (HSA)? If so, please provide the amounts YOU paid and amounts YOUR EMPLOYER contributed.
12. Have you inherited an IRA since 2019? If so, when the owner of the IRA died, was he/she taking required minimum distributions (RMD)? At what age did the owner die? Did you take any distributions from the inherited IRA in 2025? Please include this information with your tax documents.
13. Did you pay quarterly estimated tax payments to the IRS? Ohio? School District? Local municipality? If so, please include evidence of those payments with your tax documents.
14. Did you install a qualifying electric system that uses solar, wind, geothermal or fuel cell power? If so, please provide receipts for qualified purchases.
15. Did you purchase an Electric Vehicle? If so, please provide purchase documents.
16. Did you take out an auto loan to purchase a motor vehicle in 2025? If so, please provide the auto loan information and the VIN, make, model and year of the vehicle purchased.
17. Did you receive tip income in 2025? If so, please include the amounts received.
18. Did you earn overtime pay in 2025? If so, please include a record of the overtime hours worked and rate of pay for those hours.
19. Please confirm bank routing number and account number for direct deposit of refunds.

Name: _____ Email: _____
Phone Number: _____