

# Client Questionnaire - 2025

**Name:** \_\_\_\_\_

First and Last Name

**Date:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

**Yes      No      Unsure**

Change in address? (if yes, please write new address on back)			
Change in bank (for direct deposit/auto withdrawal)? (if yes, use back)			
Did you make any estimated tax payments? (if yes, please provide dates & amts)			
Any contributions to an IRA (Traditional or Roth)?			

**Dependents:**

Any changes in dependents? (birth, death, marriage, etc.)			
Did any of your dependents claim themselves on their return(s)?			
Did you pay for any child/dependent care expenses?			
Did you pay for any college tuition or student loan interest?			
Did you make any contributions to MI Education Plans?			

**Health Insurance:**

Were you in the healthcare marketplace? (if yes, please provide 1095-A)			
Do you have a Health Savings Account? (please provide 5498-SA & 1099-SA)			
↳ Distributions? Were they used for qualified medical expenses?			
Did you pay any out-of-pocket medical insurance premiums?			

**Home:**

Do you own, rent, live with parents, etc.? (please circle one)	<b>OWN</b>	<b>RENT</b>	<b>OTHER</b>
Any other income contributors in the home?			
Did you make any energy efficient upgrades to your home?			

**Income:**

Any unemployment income? (please provide 1099-G)			
Do you have funds in a foreign bank account? (if yes, more than \$10k?)			
Any digital currency transactions (such as Bitcoin)?			
Any gambling income? Losses? (please provide W-2G)			
Any self-employment income? (please provide income & expenses)			

**2025 Updates:**

Any TIP Income? (please provide amounts if not on W-2)			
Any OVERTIME Income? (may need final paystub w/ details for 2025)			
Did you purchase a new vehicle in 2025 (with interest paid)?			

**NEW CLIENTS:** Please provide

- Birthdates for all taxpayers & dependents
- Previous year tax return
- Copies of Drivers License for Taxpayer and Spouse (if applicable)  
(use back if needed)