

Tax Questionnaire – 2025

Please answer the following questions as appropriate for your tax situation:

How would you like to receive and sign for your finalized tax returns?

Pickup in Henrietta: _____ Electronically: _____ Pickup in Brockport: _____

In the event you were to receive a refund, how would you like your refund?

Refund Direct Deposit: _____ Apply to 2026 Estimated Tax: _____

If you have a tax balance due to the IRS or a state, how would you like to pay this?

I will pay online, myself: _____ Auto-debit from bank account: _____

General Questions:

Are you a veteran of the US military? Yes _____ No _____

Are you clergy? Yes _____ No _____

Are you permanently disabled? Yes _____ No _____

Tax Return Questions:

Do you own or have a partnership in a business? Yes _____ No _____

Do you own rental properties? Yes _____ No _____

Did you send any family member, friend or other individual more than \$19,000 in 2025? Yes _____ No _____

Do you receive K-1's? Yes _____ No _____

Did you sell any cryptocurrency in 2025? Yes _____ No _____

Do you have any bank or financial accounts overseas, or receive any gifts from overseas? Yes _____ No _____

Updates:

Please list below any major changes to your tax situation since last year (ex. Newly married, divorced, new child born, moved residences, house sales) anything you would like us to be aware of for this year:
