

# **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:

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