

# Tax Partners Northwest Personal Tax Return Questionnaire

## Client information

	Taxpayer	Spouse
First and last name		
Social security number		
(if not on file)		
Occupation		
Date of birth		
Driver's license number		
State/issue/exp date		
Primary phone		
Email		
Mailing Address		
Preferred method of contact		
IRS Identity Theft PIN?		

## Dependents

	Dependent 1	Dependent 2
First and last name		
Social security number		
(if not on file)		
Date of birth		
Relationship		
Months lived in home		
US Citizen or resident?		
Amount paid for daycare		
(attach statement)		
Full time student?		
Amount paid for college		
Income earned		
Investment income		

### Attach information for additional dependents

Please list the forms you are providing	How many?
W-2s	
1099 Interest	
1099 Dividends	
1099R Retirement	
1099B Stock sales	
1099 DA for digital assets like cryptocurrency or NFTs	
W-2G Gambling income	
Gambling loss statement	
1099 MISC or 1099 NEC income	
1099G Unemployment/Paid Family Medical Leave	

SSA 1099 Social security	
1099S Sale of real estate -- provide closing papers.	
1099C Cancellation of debt	
Money withdrawn from college savings plan 1099Q	
Did you pay any expenses with a Health Savings Account? Attach forms 1099SA	
K-1 forms	
Any other sources of income? Provide details	

**General information - Please answer all questions**

- At any time in 2025, did you receive, sell, exchange or otherwise dispose of any financial interest in any virtual currency? Yes  No
- Did you or your spouse have a foreign bank account or trust, or signature authority over someone else's? Yes  No
- Did you receive a gift or inheritance from someone in another country? Yes  No
- Did you make any gifts larger than \$19,000 per individual or trust in 2025? Yes  No
- Did you pay any foreign taxes that aren't already included on a tax form? Yes  No
- Did you pay any household employee more than \$2800 in 2025? Yes  No
- Did you or your spouse have income from a hobby, prizes, barter, jury duty or any other income? Yes  No
- Did you receive money from any type of settlement? Yes  No
- Did you have to repay any unemployment in 2025? Yes  No
- Did you receive overtime pay in 2025? If so, please attach your final paystub for the year or a letter from your employer to verify the amount if it isn't shown on the W-2. Yes  No
- Did you receive tips in 2025? Provide supporting documentation. Yes  No
- Did you purchase a new car in 2025? Please provide purchase agreement and your final loan statement for the year. Yes  No

**Payments**

Did you make any payments to IRS toward your 2025 taxes? List dates and amounts.

Did you have any significant changes in 2025? Is there anything you want to plan for in 2026?  
Anything else you want your preparer to know?

**Check yes and provide info for the items that apply to you**

**Small business items**

- Please attach your summary of business income and expenses
- 1099 NEC or 1099K income
- Did you have any income from out of state sources?
- Did you receive any grants?

**Rental property**

- Please attach your summary of rental income and expenses
- Any new assets purchased?
- Any assets taken out of service?
- What dates was it available to be rented?

**Retirement**

- Did you or will you make a contribution to a retirement plan outside of work?
- Did you contribute to a Roth IRA outside of work?
- Did you roll over any retirement money into a Traditional IRA?
- Did you convert any Traditional IRA funds to Roth?
- Did you make any Qualified Charitable Donations from your RMD?
- Did you take an early distribution from a retirement account? If you did, what did you use the money for?

**Health Care Coverage Forms**

- 1095A if you purchased your insurance through the state marketplace
- 1095B and 1095C showing health insurance coverage
- 1099 LTC Long Term Care insurance payments

**Adjustments to income**

- Are you or your spouse a teacher in grades K-12 and spent money out of pocket on classroom supplies or PPE in 2025?
- Are you or your spouse self-employed and paid for health insurance out of pocket?
- 1098E Student loan interest
- Did you pay or receive alimony from a divorce that was final before 2019?
- Did you contribute to a health savings account outside of a payroll deduction?

How  
much?


Due to changes in the tax laws, you might be able to itemize your deductions for 2025 even if you have not been able to for the last few years. If you will fill out this next part, we'll check for you.

**Deductions**

**Medical and Dental Expenses not reimbursed**

<input type="checkbox"/>	Prescription medicine and drugs	
<input type="checkbox"/>	Doctors, dentists and nurses	
<input type="checkbox"/>	Hospitals and skilled nursing facilities	
<input type="checkbox"/>	Insurance premiums paid with after-tax money	
<input type="checkbox"/>	Long term care premiums - taxpayer	
<input type="checkbox"/>	Long term care premiums - spouse	
<input type="checkbox"/>	Hearing aids, glasses, contacts	
<input type="checkbox"/>	Other medical equipment and supplies	
<input type="checkbox"/>	Medical miles driven	

**Taxes Paid**

<input type="checkbox"/>	State, city and local income taxes paid	
<input type="checkbox"/>	State and local sales taxes paid, if you kept track of the actual amount	
<input type="checkbox"/>	Sales tax paid on purchase of vehicles and construction materials	
<input type="checkbox"/>	Real estate taxes paid	
<input type="checkbox"/>	Personal property taxes paid (RTA excise tax on vehicles)	

**Other Deductions**

<input type="checkbox"/>	Mortgage interest paid (attach 1098 form - if you refinanced during the year, or your loan was sold, there may be more than one)	
<input type="checkbox"/>	If you refinanced in 2025, attach closing statement	
<input type="checkbox"/>	Donations to charitable organizations by cash, check, credit card	
<input type="checkbox"/>	Non-cash donations to charitable organizations (clothing, household items, vehicles, etc.) Political organizations do not qualify as charity.	
<input type="checkbox"/>	Miles driven for charitable purposes	

**Credits**

<input type="checkbox"/>	Did you purchase an electric vehicle before 9-30-25? Please provide paperwork.	
<input type="checkbox"/>	Did you install energy efficient improvements to your main home? (doors, windows, furnace, boiler)	
<input type="checkbox"/>	Did you install solar equipment?	

Please provide a copy of 2023 and 2024 tax returns if we did not prepare them.

Please sign and date below:

Taxpayer  
Date:

Spouse