

Client Profile Update 2025

Please complete all information and return it to our office in the envelope provided.
If a joint return is filed, please supply information for both spouses.

Name as it appears on your Social Security Card:

Taxpayer: _____

Spouse: _____

Contact Information:

Please check the box of your preferred phone number, the one you'd like us to call first.

Taxpayer Cell Phone: _____ Email: _____

Spouse Cell Phone: _____ Email: _____

Home Phone: _____

Mailing Address: _____

Is this a new address (i.e., did you move in 2025)? Yes No

**For the 2025 Tax Year, NO REFUND CHECKS will be issued by the IRS.
It is now required that you receive your refund via Direct Deposit.**

REFUND:

- The office already has my banking information on file, there has been no change since last year.
- My bank account has changed, or is not on file, so I have attached a voided check here.

AMOUNT DUE:

- I would like the amount due to be automatically withdrawn from this bank account.
- To pay the amount due, I will either mail in a check or make my payment online.

Planning for 2026

Please mark Yes or No:

- | | | |
|---|------------------------------|-----------------------------|
| I would like to discuss tax planning for 2026. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| I am interested in discussing retirement planning. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| I would like to review my current investments. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| I am interested in doing a review of my current 401(k), 457, 403b, etc. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| I would like to discuss rollover options for old 401(k)s, 457s, 403bs, etc. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| I would like to open and contribute to an IRA or a Roth IRA. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| I am interested in opening a 529 College Savings account. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| I would like to review new or existing life insurance or LTC options. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| I have additional financial and/or tax questions I would like to discuss. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

For any YES answers, we will reach out to you to schedule a conversation with Maria after the tax season, to address your questions, concerns, and plans.

The following questions pertain to the 2025 Tax Year.

For any questions answered YES,
Please provide supporting details or documents for your tax meeting.

Personal Information:	Yes	No
Did your marital status change in 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Are you married?	<input type="checkbox"/>	<input type="checkbox"/>
If YES, do you and your spouse want to file separate returns?	<input type="checkbox"/>	<input type="checkbox"/>
Dependents:	Yes	No
Were there any changes in dependents from the prior year? Note: Include non-child dependents for whom you provided more than half the support.	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse pay for childcare while either of you worked or looked for work? If YES, please include invoices with your tax documents.	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any dependent children with unearned investment income more than \$1,350?	<input type="checkbox"/>	<input type="checkbox"/>
Are any of your dependents required to file a tax return?	<input type="checkbox"/>	<input type="checkbox"/>
One Big Beautiful Bill Provisions:	Yes	No
Did you receive and claim tips in a qualified tipped occupation in 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse incur any casualty or loss attributable to a federally declared disaster?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse purchase a new alternative technology vehicle, including a qualified plug-in electric drive motor vehicle?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse install any energy efficient improvements or energy property in your residence such as exterior doors or windows, insulation, heat pumps, furnaces, central air conditioners, or water heaters?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse sell or exchange any digital assets? If YES, include Form 1099-DA.	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive overtime pay? If so, please include your last pay stub in 2025.	<input type="checkbox"/>	<input type="checkbox"/>

Healthcare:	Yes	No
Did you, your spouse, or any of your dependents obtain healthcare coverage through the Marketplace? If YES, include all Forms 1095-A with your tax documents.	<input type="checkbox"/>	<input type="checkbox"/>
Was anyone covered on your health insurance policy also covered by another health insurance policy for any part of the year?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse have any transactions pertaining to a health savings account (HSA)? If you received a distribution from an HSA, include all Forms 1099-SA	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse receive any distributions from long-term care insurance contracts? If YES, include all Forms 1099-LTC	<input type="checkbox"/>	<input type="checkbox"/>
<p>If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's health plan at another job?</p> <p>If YES, how many months were you covered? _____</p>	<input type="checkbox"/>	<input type="checkbox"/>
Education:	Yes	No
Did you, your spouse, or your dependents incur any post-secondary education expenses, such as tuition? If YES, please include your Form 1098T, which can be found on the Student Portal of the relevant educational institution.	<input type="checkbox"/>	<input type="checkbox"/>
<p>Did you or your spouse pay any student loan interest?</p> <p>If YES, please include your Form 1098E, which can be found on your loan servicer's website.</p>	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children, or your grandchildren?	<input type="checkbox"/>	<input type="checkbox"/>
<p>Did you or your spouse withdraw any amounts from a Coverdell Education Savings Account or Qualified Education Program (Section 529 plan)?</p> <p>If YES, please include all Forms 1099-Q with your tax documents.</p> <p>If YES, were the amounts withdrawn used for qualified tuition expenses?</p>	<input type="checkbox"/>	<input type="checkbox"/>
Deductions and Credits:	Yes	No
<p>Did you or your spouse contribute property (other than cash) with a fair market value of more than \$5,000 to a charitable organization?</p> <p>If YES, provide the appraisal of the property contributed. An appraisal is not required for contributions of publicly traded securities or contributions of non-publicly traded stock of \$10,000 or less.</p>	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse make any large purchases, such as motor vehicles and boats?	<input type="checkbox"/>	<input type="checkbox"/>
Did you take out a loan to purchase a new, U.S.-assembled vehicle in 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse install any alternative energy equipment in your residence such as solar water heaters, solar electricity equipment (photovoltaic) or fuel cells?	<input type="checkbox"/>	<input type="checkbox"/>

Investments:	Yes	No
Did you or your spouse have any debts canceled, forgiven, or refinanced? <i>If YES, include Form 1099-C.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse <i>start or purchase</i> a business, rental property, farm, or any existing interest in a partnership or S corporation?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse <i>sell</i> an existing business, rental property, farm, or acquire any existing interest in a partnership or S corporation?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse sell, exchange, or purchase any investment real estate? <i>If YES, include closing statements and Form 1099-S with your tax documents.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse receive grants of stock options from your employer, exercise any stock options granted to you or your spouse, or dispose of any stock acquired under a qualified employee stock purchase plan?	<input type="checkbox"/>	<input type="checkbox"/>
Retirement or Severance:	Yes	No
Did you or your spouse contribute to a Roth IRA, or convert an existing IRA into a Roth IRA?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse roll into a Roth IRA any distributions from a retirement plan?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse turn 73 and have money in an IRA or other retirement account?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse make a qualified charitable distribution directly from an IRA?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse retire or change jobs?	<input type="checkbox"/>	<input type="checkbox"/>
Personal Residence:	Yes	No
Did you or your spouse claim a homebuyer credit for a home purchased in 2008?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse withdraw any amounts from your individual Retirement Account (IRA) or Roth IRA to acquire a principal residence?	<input type="checkbox"/>	<input type="checkbox"/>
Are your total mortgages on your first and/or second residence greater than \$750,000? <i>If YES, provide the principal balance and interest rate at the beginning and end of the year.</i> Beginning of Year: _____ End of Year: _____	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse have a home equity loan or HELOC in 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your mortgagee receive mortgage assistance payments? <i>If YES, include all Forms 1098-MA.</i>	<input type="checkbox"/>	<input type="checkbox"/>

Sale of Your Home:	Yes	No
Did you sell your home in 2025? Original Purchase Date: _____ Original Purchase Price: _____ At the time of the sale, the residence was owned by the <input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Both	<input type="checkbox"/>	<input type="checkbox"/>
If YES, Did you receive Form 1099-S? <i>If YES, include Form 1099-S with your tax documents.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse own and occupy the home as your principal residence for at least two years of the five-year period prior to the sale?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse ever rent out the property?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse ever use any portion of the home for business purposes?	<input type="checkbox"/>	<input type="checkbox"/>
Gifts:	Yes	No
Did you or your spouse make any gifts, including birthday, holiday, graduation, education savings, etc., with a total value more than \$19,000 to any one individual?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse make any gifts of difficult-to-value assets (such as non-publicly traded stock) to any person regardless of value?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse make any gifts to a trust for any amount?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse assist with the purchase of any asset (auto, home) for anyone?	<input type="checkbox"/>	<input type="checkbox"/>
Foreign Matters:	Yes	No
Did you or your spouse perform any work outside the U.S. or pay any foreign taxes?	<input type="checkbox"/>	<input type="checkbox"/>
Were you or your spouse a grantor or transferor for a foreign trust, have any interest in or a signature authority over a bank account, securities account or other financial account in a foreign country?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse create or transfer money or property to a foreign trust?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse own any foreign financial assets?	<input type="checkbox"/>	<input type="checkbox"/>
Were you or your spouse subject to the transition tax on undisclosed foreign income and elect to pay the tax in installments?	<input type="checkbox"/>	<input type="checkbox"/>

Miscellaneous:	Yes	No
Did you or your spouse pay for domestic services performed in or around your home to individuals who is defined by the IRS as a household employee?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse receive unreported tip income of \$20 or more in any month?	<input type="checkbox"/>	<input type="checkbox"/>
Have you or your spouse received a punitive damage award or an award for damages other than for physical injuries or illness?	<input type="checkbox"/>	<input type="checkbox"/>
Were you or your spouse notified by the IRS or other taxing authority of any changes in prior year returns?	<input type="checkbox"/>	<input type="checkbox"/>
In 2025, did you or your spouse: (a) receive (as a reward, award, or compensation); or (b) sell, exchange, gift or otherwise dispose of a digital asset (or a financial interest in a digital asset)?	<input type="checkbox"/>	<input type="checkbox"/>
<p>Were you and your spouse both New York State Residents for ALL of 2025?</p> <p><i>If you and/or your spouse were NOT New York State residents for ALL of 2025, please indicate the dates of your NYS residency:</i></p> <p>FROM: _____</p> <p>TO: _____</p> <p>Please indicate the other states/countries and your period(s) or residency there:</p> <p>_____</p> <p>_____</p> <p>_____</p>	<input type="checkbox"/>	<input type="checkbox"/>

Thank you for providing our office with this information-

We look forward to meeting with you in the coming Tax Season!