

**PLEASE ANSWER ALL (even if the answer is NO) & ATTACH all PERTINENT data.**

**IN 2025, YOU (OR YOUR SPOUSE):**

**YES** **NO**

- Has your Marital Status Changed? \_\_\_\_\_ 
- Did your Address Change since you filed your 2025 Return? \_\_\_\_\_
- Are you being claimed as a Dependent on another person's return? \_\_\_\_\_
- Are there any changes in the Dependent Information from 2024 (school, dependency, etc) \_\_\_\_\_
- Do your Dependent children have Investment Income? \_\_\_\_\_
- Were You and/or your Spouse a Citizen all year? (Circle which one(s)) \_\_\_\_\_
- Were you and/or your Spouse a Resident Alien All Year? (Circle which one(s)) \_\_\_\_\_
- Do you have dependents who are NEITHER U.S. Citizens nor U.S. Residents? \_\_\_\_\_
- Did you pay **Education Expenses** for your Dependent Children? \_\_\_\_\_
- Did you pay over half of the support for a parent who lived with you or lived elsewhere? \_\_\_\_\_
- Did you maintain a household & pay over 1/2 the support for someone you are not claiming as a Dependent on your Income Tax Return (eg. Due to divorce, etc) \_\_\_\_\_
- Are either you (or your spouse, if filing with a spouse) an Honorable Discharged VETERAN of the Military or National Guard? If so, attach **DD214 if not already provided.** \_\_\_\_\_
- Have you or your spouse or your dependents been victims of Identity Theft and/or been given an **Identity Theft Protection Six Digit PIN** by the IRS? \_\_\_\_\_
- Receive any **Income Tax Notices** from the IRS or the State? \_\_\_\_\_
- Were you ever Denied or Disallowed the Earned Income Tax Credit or Child Tax Credit in a Prior Year, or were your credits reduced in a prior year? \_\_\_\_\_

**FOREIGN INCOME**

- At any time during 2025, Did you (alone or with another) Hold **signature authority** or an interest in or have funds in a **foreign bank, securities, or other financial accts?** \_\_\_\_\_ 
- Have **income producing** assets in a **foreign country, sell** foreign property, or pay foreign taxes? \_\_\_\_\_
- Receive gifts or bequests from a **foreign entity or from a Foreign person?** \_\_\_\_\_
- Did you receive any Foreign Income of any sort, rental property, business, etc? \_\_\_\_\_

**SALES & USE TAX**

- Make an **out-of-State** purchase or online for which you owe **USE TAX**, or **other Sales Taxes?** \_\_\_\_\_
- Buy a new vehicle, boat or aircraft and pay **State Sales Tax?** (give details) \_\_\_\_\_

**Be sure to provide all pertinent information. Packet A on our website contains important information and explanations for many of the questions. [www.nancyfeltz.com](http://www.nancyfeltz.com)**

## INCOME

YES        NO       

- Have **Any Other Income** not included in these questions?:
  - a. Solar Power Income from Home Panels?
  - b. GIG Economy Income (online, freelance, platform, marketplace, apps, Airbnb, etc?
  - c. Independent Contract work even if not reported on a tax document?
  - d. Unreported Tip Income?
  - e. Gambling Winnings or Losses, Fantasy Sports, etc., ETC.- online or in person
- Have **Any Other** Income that was NOT reported on a Tax Document?
- Receive Unemployment Compensation [and/or Disability Payments](#)
- Receive Tip Income or Overtime Pay?
- Receive Alimony (provide Date of Divorce Decree and amount)?
- Receive **early distribution** from IRA, 401(k), etc. (give details of use) eg, for **medical expense**
- Receive payments from a **Long-Term Care** Insurance Contract? [Attach](#)
- Receive **Employer provided education assistance**?
- Did you **Barter** your Services for goods or services from someone else?
- Receive Stock from a Stock Bonus Plan with your Employer?
- **Sell any assets** other than stocks & bonds?
- **Purchase or sell** your Principal residence, or re-finance? Attach Closing Documents)
- Did you purchase or sell **any other** Residence or Property? (Attach Closing Documents)
- Is your home considered a **Historic Home**?
- Suffer a **Foreclosure** on a home or have **Mortgage Debt Forgiveness**, have a **Short Sale, etc?**
- **CRYPTO CURRENCY/VIRTUAL CURRENCY AND NFT's, etc.**

AT ANY TIME DURING 2025, DID YOU

  - (a) Sell, Exchange, Gift, or otherwise Dispose of a Digital Asset (or a financial interest in a Digital Asset)
  - (b) Receive (as a reward, award, or payment for property or services) or as a hobby; or
  - (c) Receive Digital Assets resulting from a hard fork?
- Go through **Bankruptcy** proceedings?
- Make a **ROTH conversion** in 2025?
- Make a Qualified Distribution to a **Charity** from a **ROTH or Traditional IRA**?
- Suffer a **casualty loss** of any kind or in a **FEDERAL declared disaster area**?
- Receive proceeds from a **lawsuit or class action**?
- Were you a victim of **investment theft** or a **Ponzi Scheme**?
- Have income from **installment sales**?
- Make a Loan at an Interest Rate below Market Rate?
- Did any security become worthless during 2025 or any debts become uncollectible?
- Did you exchange any securities or investments for something other than Cash?



- Receive **Hobby** Income? \_\_\_\_\_
- Engage in any **Farming** activities? \_\_\_\_\_
- Receive **TIP Income** which is not reported on Form W-2's? \_\_\_\_\_
- Anticipate a **Major Change in Income or Deductions** for the coming year? \_\_\_\_\_

**DEDUCTIONS FROM INCOME**

- **Pay Expenses for the care of your Child or other qualifying person so you could work?** \_\_\_\_\_
- **Pay any Student Loan Interest?** \_\_\_\_\_
- Have **moving expenses (FOR MILITARY PERSONNEL ONLY)?** \_\_\_\_\_
- Make or plan to make any contributions to a **Self-employed SEP, SIMPLE or Qualified Plan?** \_\_\_\_\_
- Make or plan to make any contributions to an **IRA, or ROTH IRA, etc** for 2025? \_\_\_\_\_
- Make or plan to make contributions to a Medical Savings Account for 2025 (**HSA, Archer MSA, etc.**) \_\_\_\_\_
- Make or plan to make any contributions to a Section 529 or ABLE account? \_\_\_\_\_
- Have un-reimbursed **Educator Expenses?** (Covid supplies qualify) (**\$300 for 2025**) \_\_\_\_\_
- Incur unreimbursed expenses as a **Reservist, performing artist or fee-based govt official?** \_\_\_\_\_
- Pay expenses to **adopt** a child in 2025 or file a Form 8839 Adoption Credit in a prior year? \_\_\_\_\_
- Pay **household employees** (over age 18), nanny, housekeeper, cook, etc of **\$2,700** or more? \_\_\_\_\_
- Purchase New car for Personal use which you financed in 2025? \_\_\_\_\_
- Perform or purchase any **SOLAR or Energy Efficient Property or HOME IMPROVEMENTS?** \_\_\_\_\_
- Did you pay for Long Term Care Insurance? \_\_\_\_\_
- Pay Alimony (Provide Date of Divorce Decree and Amount)? \_\_\_\_\_

**HEALTH COVERAGE**

- Did you have **Health Insurance Coverage** at any time in **2025?** Give details and months (B4) \_\_\_\_\_
- Did you receive **Form 1095-A** for 2025 regarding health coverage? Provide all copies ... \_\_\_\_\_
- Did you receive any other Forms 1095? Please provide \_\_\_\_\_

**OTHER**

- Make gifts of more than **\$19,000** to any individual, a trust or a Qualified Prepaid Tuition Plan? \_\_\_\_\_
- Need my Services for preparation of **Estate, Gift or Inheritance Tax Returns?** \_\_\_\_\_
- **NEW CLIENTS** – Have you sold business property in the last 5 years? Paid AMT in the past? \_\_\_\_\_
- INDICATE IF I CAN DISCUSS YOUR RETURN WITH Anyone else: NO\_\_\_\_\_, IF YES\_\_\_\_\_, PROVIDE name or names and relationship of the individual(s).

Name \_\_\_\_\_ Phone \_\_\_\_\_ Name \_\_\_\_\_ Phone \_\_\_\_\_

**SIGNATURES** x \_\_\_\_\_ x \_\_\_\_\_ **Date** \_\_\_\_\_