

IF YES, YOU MUST ATTACH THE PAPERWORK OR EXPLANATIONS.**Answer ALL Questions even if the answer is NO**

- 1 DID YOU (AND ALL MEMBERS OF YOUR TAX HOUSEHOLD) HAVE QUALIFIED HEALTH INSURANCE IN 2025? (Please provide any Forms 1095-A, B, and C, if applicable). YES _____ NO _____
- 2 DID YOU RECEIVE ANY FOREIGN INCOME OR PAY ANY FOREIGN TAXES? YES _____ NO _____
- 3 AT ANY TIME DURING 2025, DID YOU (ALONE OR WITH ANOTHER) HOLD A SIGNATURE AUTHORITY OR HAVE FUNDS IN A FOREIGN BANK, FOREIGN SECURITIES OR OTHER FOREIGN FINANCIAL ACCOUNTS? YES _____ NO _____
- 4 AT ANY TIME DURING 2025, DID YOU RECEIVE ANY GIFTS OR BEQUESTS FROM A FOREIGN PERSON OR ENTITY? YES _____ NO _____
- 5 Did you own a business or property in a Foreign Country? YES _____ NO _____
- 6 Did any of your children receive more than \$1,350 in Investment Income ? YES _____ NO _____
- 7 IN 2025, DID YOU MAKE AN OUT-OF-STATE OR ON-LINE PURCHASE FOR WHICH YOU OWE USE TAX, OR OWE OTHER SALES TAX? YES _____ NO _____
- 8 **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
 © Receive Digital Assets resulting from a hard fork? _____
 9 RECEIVE **ANY OTHER INCOME** THAT HAS **NOT BEEN** REPORTED TO YOU ON A TAX DOCUMENT?
 For example, but **not limited to**:
 - a. Solar Power Income from Home Panels? YES _____ NO _____
 - b. GIG Economy Income (online, freelance, platform, marketplace, apps, etc)? YES _____ NO _____
 - c. Independent Contract work even if not reported on a tax document? YES _____ NO _____
 - d. Unreported Tip Income? YES _____ NO _____
 - e. Gambling Winnings, Fantasy Sports, etc? YES _____ NO _____
 - f. OTHER (Include all Forms 1099-K) YES _____ NO _____
- 10 Did you make a contribution to, or receive a distribution from a 529 account, ABLE account, etc. YES _____ NO _____
- 11 Did you make a Contribution to an IRA or other non-employer sponsored retirement plan? YES _____ NO _____
- 12 Purchase of personal use car in 2025 which you **financed**? YES _____ NO _____
- 13 Are you a full time K-12 Teacher with out-of pocket Expenses? YES _____ NO _____
- 14 DID YOU GO THROUGH BANKRUPTCY PROCEEDINGS OR SUFFER A FORECLOSURE, OR HAVE A SHORT SALE? YES _____ NO _____
- 15 Does anyone owe you money which has become uncollectible? YES _____ NO _____



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- 16 Move and incur moving expenses as part of Military Service? YES _____ NO _____
- 17 Hire a Nanny or other Household Employees? YES _____ NO _____
- 18 Did you receive any Inheritance or have any Inherited Financial Assets? YES _____ NO _____
- 19 Did you receive Tip Income or Overtime Pay? YES _____ NO _____
- 20 Did you receive any notices from the Federal or State Taxing Agency? YES _____ NO _____
- 21 Did you (or spouse) make any gifts to individuals (cash or non-cash) that total more than \$19,000 each taxpayer to any recipients (\$19,000 per recipient), including children, or make any gifts to Trusts?
YES _____ NO _____
- 22 Make a Qualifying Charitable Distribution of your RMD or any part of the RMD? YES _____ NO _____
- 23 Do you pay for Dependent or Child Care? YES _____ NO _____
- 24 Did you make any Energy Efficient upgrades to your Home? YES _____ NO _____
- 25 Did you or will you receive a K-1 from a Partnership, S-Corp, Trust or Estate YES _____ NO _____
- 26 ARE EITHER YOU (OR YOUR SPOUSE, if filing with a spouse) AN HONORABLY DISCHARGED VETERAN OF THE MILITARY OR NATIONAL GUARD? YES _____ NO _____
- 27 ARE YOU AND/OR YOUR SPOUSE A **CITIZEN** ALL YEAR? (circle) YES _____ NO _____
- 28 OR ARE YOU AND/OR SPOUSE A RESIDENT ALIEN ALL YEAR? (circle) YES _____ NO _____
- 29 Were you (and/or spouse) a victim of Identity Theft and/or have been given an **Identity Theft Protection Six Digit PIN by the IRS?** YES _____ NO _____
- 30 WERE YOU EVER DENIED OR DISALLOWED THE EARNED INCOME TAX CREDIT or CHILD TAX CREDITS IN A PRIOR YEAR, OR WERE YOUR CREDITS REDUCED IN A PRIOR YEAR? YES _____ NO _____
- 31 May the IRS and the State Taxing Agents discuss your return with me, Nancy M. Paparazzo, EA? YES _____ NO _____
- 32 INDICATE IF I CAN DISCUSS YOUR RETURN WITH ANYONE ELSE: **NO** ____, IF **YES** ____, PROVIDE name or names and relationship of the individual(s).

PLEASE PROVIDE ALL PERTINENT DATA TO THESE AND ANY OTHER INFORMATION YOU DID NOT INCLUDE IN THE SYSTEMIZER. **Packet A**, which can be viewed on our website www.nancyfeltz.com contains important information regarding many of the above items as well as new tax provisions of the OBBBA.

_____ Date _____ Date _____