

Tax Year 2025

Name(s): _____

Were you legally married or legally single as of the last day in 2025? _____

If legally married as of the last day of 2025, do you both agree to file a joint return? _____

What is or will be your current address as of the filing of this return: _____

What was your occupation title last year: _____ Spouse: _____

Did anyone on the return have any digital asset (ex. Bitcoin cryptocurrency) transactions in 2025? _____

Did anyone on the return have any online purchases in which sales tax was not paid? _____

Did anyone on the return have any financial interest or signature authority over a financial account located in a foreign country? _____

If yes, Form 8938 will be required to be attached to return if assets exceeded \$50k last day of the tax year or \$75k at any time during the tax year.

Did anyone on your return gift more than \$19,000 of property or money to another in 2025? _____

Did you make any estimated tax payments? _____

Did you or your spouse purchase an electric vehicle last year? (If so, purchase papers are required.) _____

Did you or your spouse contribute to a retirement plan outside of work (IRA)? _____

If so, provide details: _____

ONLY for born 12/31/1952 or before OR individuals with inherited retirement accounts (write N/A if not applicable):

Were all Required Minimum Distributions (RMD) taken in 2025? _____

Dependents:

Which dependent(s) will you be claiming on this year's tax return (please write legal name):

- | | |
|----------|----------|
| 1. _____ | 4. _____ |
| 2. _____ | 5. _____ |
| 3. _____ | 6. _____ |

For the dependents listed above:

Were you (or your spouse if filing jointly), legally eligible to claim each dependent? _____

Can anyone else legally claim any of the dependents listed above? _____

Did you provide at least 50% financial support for the dependents listed above? _____

Did each dependent live with you at least 50% of last year? _____

Has any tax credit related to dependents ever been reduced or disallowed in a prior year after an attempt was made to take the credit? _____

Taxpayer's Signature: _____ Spouse's Signature: _____