

Jupiter CPA, Inc. 2025 Questionnaire*

Please fill in the appropriate Circle and INCLUDE ALL THE NECESSARY DOCUMENTS

Personal Information: NAME

YES NO Did your marital status, home address, contact, or banking information change within the past year?

YES NO Could you or your dependent be claimed as a dependent on someone else's return for 2024? If yes _____

YES NO Did you receive correspondence from the state or IRS? Or an identity theft PIN. Please provide a copy.

YES NO If there is an overpayment of taxes how would you like them: Estimated Payments____ Refund by check____ Direct Deposit____

YES NO Did you make any estimated payments during the year? If yes, Amounts and dates of each: _____

Dependent Information:

YES NO If you have a dependent born in 2025 do you want to establish a Trump account?

YES NO Were there any changes in dependents, and did they earn money and file their own tax return? If yes, explain

YES NO Did you provide over half the support for any other persons other than your dependent children during the year? If so, who?

YES NO Did you pay for childcare while you worked, looked for work, or while a full-time student? If yes, provide receipts and EIN

YES NO Are you divorced or separated with child(ren) (within the past year); do you have a finalized divorce decree?

Purchases, Sales, and Debt Information:

YES NO Did you start, sell, or purchase a business or rental property during 2024? If so, provide documents.

YES NO Did you acquire or lose any stock this year? Provide realized gains/losses.

YES NO Did you purchase, sell, refinance or abandon a principal residence or second home this year? If so, provide documents.

YES NO Did you have any debts canceled or forgiven this year, such as, home mortgage or other debts.

YES NO Are you owed money which became uncollectable or incurred a loss because of damage or stolen property?

Income Information:

YES NO Did you receive unemployment or disability benefits/income this year? Provide disability/income or 1099-G

YES NO Did you receive tips or overtime pay reported on W2, provide documentation.

YES NO Did you make or receive a gift of more than \$19,000 to or from anyone?

YES NO Did you receive any awards, prizes, hobby income, gambling, or lottery winnings?

YES NO Did you pay or receive alimony due to divorce? If so, how much?

Retirement Information:

YES NO Did you receive any Social Security benefits during the year? Provide SS statement

YES NO Did you receive any payments (lump sum or regular) from a pension, profit sharing or 401(k) plan? Provide 1099-R

YES NO Did you make contributions, or roll over to an IRA, Roth, Keogh, Simple, SEP, or other qualified retirement plan? How Much?

Education Information:

YES NO Did you, your spouse, or dependents attend a post-secondary school during the year? Provide 1098-T

YES NO Did you pay any student loan interest this year? Provide 1098-E

YES NO Did you contribute or receive a distribution from an education savings account?

Health Care Information:

YES NO Did you enroll in Marketplace Coverage through healthcare.gov? Please provide any Form(s) 1095-A

YES NO Did you make any contribution to or have a distribution from a Health savings account (HSA) or Archer MSA?

Miscellaneous Information:

YES NO Did you want a copy of your return emailed to you? E-mail: _____

YES NO Did you use fuel for any off-road business or commercial Fishing?

YES NO Did you engage in a transaction involving virtual currency or digital assets in 2025

YES NO Did you make energy efficient improvements to your home?

YES NO Did you purchase a new vehicle and secure a loan during 2025, GVW under 14000bs. Provide purchase papers

Itemization: If you can overcome the standard deduction (Married filing jointly \$31,500, HOH 23,625.00 and Single filer \$15,750) ask for additional questionnaire.

ITEMIZED DEDUCTION QUESTIONNAIRE

YES NO Did you pay long-term care premiums for yourself or your family?

YES NO Did you make any cash or non-cash charitable contributions (clothes, furniture, etc.)? Attach totaled receipts.

YES NO Did you have out of pocket medical expenses including health insurance?.

YES NO Did you Pay any mortgage interest?

YES NO Did you make any major purchases during the year (including cars, electric vehicles, boats, etc.)? Provide Bill of Sale.

YES NO Did you pay state or local real estate property taxes this year? How much? \$_____ When?

YES NO Did you have gambling losses up to the amount of gambling winnings?