

Jupiter CPA, Inc. 2025 Questionnaire*

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

Personal Information: NAME _____

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

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

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

O YES O NO If there is an overpayment of taxes how would you like them: Estimated Payments ____ Refund by check ____ Direct Deposit ____

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

Dependent Information:

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

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

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

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

O YES O 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:

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

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

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

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

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

Income Information:

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

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

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

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

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

Retirement Information:

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

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

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

Education Information:

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

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

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

Health Care Information:

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

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

Miscellaneous Information:

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

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

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

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

O YES O NO Did you purchase a new vehicle and secure s 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

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

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

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

O YES O NO Did you Pay any mortgage interest?

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

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

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