

NAME(S)/BUSINESS: _____

ADDRESS: _____

PHONE#: _____

EMAIL ADDRESS: _____

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| 1. DID YOU RECEIVE UMEMPLOYMENT THIS YEAR? | YES/NO |
| A. IF YES, DID YOU GET YOUR 1099G? | YES/NO |
| 2. DO YOU HAVE INVESTMENTS IN BITCOIN OR ANY OTHER VIRTUAL CURRENCY? | YES/NO |
| A. IF YES, DID YOU SELL/EXCHANGE/GIFT/OR DISPOSE OF ANY OF IT? | YES/NO |
| 3. HAS ANY OF YOUR PERSONAL INFORMATION CHANGED? | YES/NO |
| (NAME/ADDRESS/PHONE #/ BANK ACCOUNT/FILING STATUS/# OF DEPENDENTS/EMAIL) | |
| 4. DID YOU RECEIVE MARKET PLACE INSURANCE? | YES/NO |
| A. IF YES, DID YOU RECEIVE YOUR 1095A? | YES/NO |
| 5. DID YOU SELL ANYTHING ON EBAY/ETSY/MARKET PLACE/OR ANY OTHER SIMILAR SITE? | YES/NO |
| A. IF YES, DID YOU RECEIVE A 1099 K? | YES/NO |
| 6. DID YOU PAY ANY FEDERAL OR STATE ESTIMATED TAX FOR THIS TAX YEAR? | YES/NO |
| 7. DOES ANYONE IN YOUR HOUSEHOLD ATTEND COLLEGE? | YES/NO |
| A. DID YOU RECEIVE A 1098T? | YES/NO |
| B. WHICH YEAR OF COLLEGE ARE YOU/THEY IN? | _____ |
| 8. DID YOU DO ANY ENERGY EFFICIENT HOME IMPROVEMENTS? | YES/NO |
| 9. DID YOU PURCHASE A VEHICLE IN 2025? | YES/NO |
| A. WAS IT AN ELECTRIC VEHICLE | YES/NO |
| B. WAS IT NEW OR USED | NEW/USED-2024/2025/2026 |
| 10. FARMERS/DID YOU RECEIVE ANY EMERGENCY RELIEF? | YES/NO |
| A. IF YES, DID YOU RECEIVE YOUR 1099 G FROM FSA | YES/NO |
| 11. DID YOU RECEIVE OVERTIME IN 2025? | YES/NO |

SIGNATURE: _____ **DATE:** _____