



2025 Tax Questionnaire

Please answer the following questions to the best of your ability and attach all requested documents.

General Information

Question	Yes	No	Org.	Page	Inclusion Reminders and Other Information
1 Do you want paper copies of your tax returns?	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Nominal fee applies.
2 We will send your e-file signature forms by RightSignature so that they can be signed electronically. If you do NOT want to sign your e-file forms electronically, check the NO box.	<input checked="" type="checkbox"/>	<input type="checkbox"/>			By checking NO, we will not use RightSignature for your electronic e-file signatures. You will be responsible for returning your e-file forms by delivery, email or fax.
3 Did you receive ANY correspondence from the IRS or state agencies?	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Include all correspondence not previously provided to us.
4 Do you want to allocate \$3 to the Presidential Election Campaign Fund:					
	For yourself? <input type="checkbox"/>	<input checked="" type="checkbox"/>			
	For your spouse? <input type="checkbox"/>	<input checked="" type="checkbox"/>			
5 Did both you and all members of your household have minimum essential healthcare coverage in 2025?	<input type="checkbox"/>	<input checked="" type="checkbox"/>			**Answer Required** Healthcare is required for California & many other states.
6 Did you receive an IRS PIN notice (CP01A) for your 2025 tax returns?	<input type="checkbox"/>				These are NOT provided to all taxpayers. If you had an IRS identity protection PIN last year, this notice will be mailed every January and is required to e-file your tax returns. Use the following link to retrieve lost or missing IP PIN's: https://www.irs.gov/identity-theft-fraud-scams/retrieve-your-ip-pin
		Department of the Treasury Internal Revenue Service IRS Kansas City Service Center - SP Kansas City, MO 64999-0017	Notice Tax year Notice date To contact us	CP01A January 2, 2025 Phone 1-800-908-4490	
	Important information about filing your 2025 federal tax return We assigned you an Identity Protection Personal Identification Number				
7 Did you know that if you fill out this questionnaire from start to finish, F&P will enter you into a contest to win \$50 from a store of your choice?	<input type="checkbox"/>	<input checked="" type="checkbox"/>			You would like your winning gift card from (indicate "F&P" if you'd prefer a credit for F&P services).
8 Did you make a gift exceeding \$19,000 to a single individual during 2025?	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Provide name, address, SSN of recipient(s) & date of gift(s).
9 Did you purchase any items acquired out-of-state, online, or by mail-order from an out-of-state retailer that did not include sales tax?					Provide summarized list (cost for each item).
10 Did you pay wages of \$2,800 or more during the year to household workers, not including amounts paid to an agency?	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Include payroll reports. The W-2 to your employee is due by 1/31/26.

Income

Question	Yes	No	Org.	Page	Inclusion Reminders and Other Information
11 In 2025, did you have any of the following:					
		Wages? <input type="checkbox"/>	<input checked="" type="checkbox"/>	10	Include form(s) W-2
		Overtime income? <input type="checkbox"/>	<input checked="" type="checkbox"/>	10	Include your final 2025 paystub with overtime clearly indicated.
		Tip income? <input type="checkbox"/>	<input checked="" type="checkbox"/>	10	Include your final 2025 paystub with tips clearly indicated.
		Non-employee compensation? <input type="checkbox"/>	<input checked="" type="checkbox"/>	14.1	Include form(s) 1099-NEC
		Gambling income? <input type="checkbox"/>	<input checked="" type="checkbox"/>	13.2	Include form(s) W-2G and total gambling losses
		Foreign income? <input type="checkbox"/>	<input checked="" type="checkbox"/>		All amounts need to be included in the organizer.
		Rebate income? <input type="checkbox"/>	<input checked="" type="checkbox"/>	14.1	Provide details and 1099-MISC, if received
		Interest income? <input type="checkbox"/>	<input checked="" type="checkbox"/>	11	Include form(s) 1099-INT
		Dividend income? <input type="checkbox"/>	<input checked="" type="checkbox"/>	12	Include form(s) 1099-DIV
		Social security benefits? <input type="checkbox"/>	<input checked="" type="checkbox"/>	14.1	Include form(s) SSA-1099
		State income tax refunds? <input type="checkbox"/>	<input checked="" type="checkbox"/>	14.2	Include form(s) 1099-G
		Unemployment compensation? <input type="checkbox"/>	<input checked="" type="checkbox"/>	14.2	Include form(s) 1099-G
		Cancellation of debt? <input type="checkbox"/>	<input checked="" type="checkbox"/>	14.1	Include form(s) 1099-C
		Health savings account (HSA) distributions? <input type="checkbox"/>	<input checked="" type="checkbox"/>	32.1	Include form(s) 1099-SA
		Education savings accounts or qualified tuition program distributions? <input type="checkbox"/>	<input checked="" type="checkbox"/>	14.3	Include form(s) 1099-Q
		Long term care benefit payments? <input type="checkbox"/>	<input checked="" type="checkbox"/>	14.1	Include form(s) 1099-LTC
		Receipts exceeding \$20,000 transacted through any single third-party settlement organization (aka payment apps & online marketplaces)? <input type="checkbox"/>	<input checked="" type="checkbox"/>	14.1	Include form(s) 1099-K.



Children & Dependents

Question	Yes	No	Org.	Page	Inclusion Reminders and Other Information
12 Do any of your dependent children file their own tax returns? If yes, did they claim their own exemption?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2		Your tax return will be rejected if your child files their own tax return and does NOT indicate they are claimed as a dependent on someone else's tax return!
	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
13 Were your dependent children (who are <u>over</u> age 18) full-time students in 2025?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2		"Full-time" is considered five months or more.
14 Did your dependent children (who are age 18 or <u>under</u>) have investment income in excess of \$2,700?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2		

Don't forget to take a break from all the exciting tax questions to take a stab at our 2025 trivia!

1. What was Oxford Dictionary's 2025 word of the year?

Children & Dependents (continued)

Question	Yes	No	Org.	Page	Inclusion Reminders and Other Information
15 Did you pay over 50% support for a parent?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2		If yes, you may be able to claim them as a dependent.
16 Did you pay any dependent care expenses for a child or a parent?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	33.1,33.2		Need name, address, and EIN/SSN for all daycare providers.

Foreign Reporting

Question	Yes	No	Org.	Page	Inclusion Reminders and Other Information
17 At any time during 2025, did you own or have signature authority over a foreign bank account with a balance in excess of \$10,000 USD?	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Tax returns due 4/15/26 (automatic 6-month extension). If you will file your own FIN CEN form, initial here _____
18 Do you own any foreign financial assets (including partnership interests, hedge funds and private equity funds) with a FMV in excess of \$50,000 at 12/31/25 or in excess of \$75,000 at any time during 2025?	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Foreign stock maintained in a U.S. based brokerage account is excluded. However, foreign stock not maintained in a financial account is included.

Retirement Plans

Question	Yes	No	Org.	Page	Inclusion Reminders and Other Information
19 Did you receive any distributions from an IRA, profit-sharing plan, or other retirement plan? If yes, have you ever made a non-deductible contribution in a prior year?	<input type="checkbox"/>	<input checked="" type="checkbox"/>		13.1	Include form(s) 1099-R This will be excludable as return of principal.
20 What is the total value of ALL of your traditional IRA'S at 12/31/25? Taxpayer \$ Spouse \$ [do not include Roth's]					Required if you received IRA distributions in 2025!
21 Did you roll over any distributions into a regular IRA within 60 days? Provide rollover amount and date	<input type="checkbox"/>	<input checked="" type="checkbox"/>		13.1	Include form(s) 1099-R
22 Did you roll over any distributions into a Roth IRA within 60 days? Provide rollover/conversion amount and date	<input type="checkbox"/>	<input checked="" type="checkbox"/>		13.1	Include form(s) 1099-R
23 If you are at least 70-1/2, did you transfer IRA funds directly to a charity in 2025?	<input type="checkbox"/>	<input checked="" type="checkbox"/>		13.1	Include form(s) 1099-R & provide amount transferred. Do not also enter IRA to charity contributions as itemized deductions.
24 Excluding contributions made through an employer plan (reflected on your 2025 W-2) have you made any retirement plan contributions for 2025?	<input type="checkbox"/>	<input checked="" type="checkbox"/>		24	Be sure to complete page 24 with amount(s), dates and account type(s).
25 Do you want to make a 2025 retirement plan contribution for yourself? If the contribution is not deductible, do you still want to make it? If you still want to make it, do you prefer it to be a Roth IRA? Do you want the extra catch-up if you are age 50+ at 12/31/25? Do you want the maximum contribution allowed?	<input type="checkbox"/>	<input checked="" type="checkbox"/>		24	All IRA's must be deposited by April 15, 2026, even if you file an extension. Contact us if you want options other than the maximum.
26 Do you want to make a 2025 retirement plan contribution for your spouse? If the contribution is not deductible, do you still want to make it? If you still want to make it, do you prefer it to be a Roth IRA? Do you want the extra catch-up if you are age 50+ at 12/31/25? Do you want the maximum contribution allowed?	<input type="checkbox"/>	<input checked="" type="checkbox"/>		24	Contact us if you want options other than the maximum.



Business Income and Expenses (sole proprietorships only)

Question	Yes	No	Org.	Page	Inclusion Reminders and Other Information
27 Did you pay any person or business (excluding corporations) for a business related service in the amount of \$600 or more? If yes, did you file a 1099-NEC on the payee's behalf?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	16		1099-NEC's and/or 1099-MISC's must be distributed to the recipient(s) by 1/31/26. Non-filed 1099's could lead to lost business deductions in the event of an IRS audit.
28 Did you purchase or dispose of any business assets (furniture or equipment)?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	16p2		Provide the item description, date placed in service, (NOT 22) cost or sales price and if the item is new or used.
29 Do you have an accounting procedure established to treat amounts paid for depreciable items costing \$2,500 or less as an expense, instead of capitalizing?	<input type="checkbox"/>	<input checked="" type="checkbox"/>			This applies to business & rental property owners only. We recommend signing the annual accounting election form available at our website.
30 Did you use your car on the job, other than commuting to/from work?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	22 p3 or 30 p2		
31 Did you purchase or sign a lease for a vehicle in 2025 used for business?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	22 p3		Include the purchase or lease contract.
32 Was any part of your home used exclusively for business or rented out?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	29		Include square footage (total house and business use).
33 Were either you or your spouse self-employed AND paying for health insurance for yourself or your family?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24		This includes adult children under age 27 as of 12/31/25.
34 Did you purchase or refinance any rental real estate? If yes, number of years for mortgage	<input type="checkbox"/>	<input checked="" type="checkbox"/>	18		Include final settlement statement, forms 1098, 2025 activity statements, and details for use of any cash back.
35 Did you convert a personal residence into rental real estate? If yes, the market value on the date it was converted was \$	<input type="checkbox"/>	<input checked="" type="checkbox"/>	18		

Gains and Losses

Question	Yes	No	Org.	Page	Inclusion Reminders and Other Information	
					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
36 Did you sell any stocks, bonds, or other investment property? <i>Note:</i> Do NOT hand-write each transaction in the organizer. We prefer electronic information.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	17		Include form(s) 1099-B for stock sales <u>and</u> ALL pages of realized gains and losses from your broker. Be sure to check for missing cost amounts!	
37 Did you sell any "qualified small business stock"?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	17		There are specific rules to qualify for this exclusion.	
38 Did you buy, sell, or receive an award of employer stock?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	17		Include your paystub(s) corresponding to the pay period(s) any income was recognized & your final paystub for 2025.	
39 Did you sell any cryptocurrency in 2025?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	17		NEW! Form 1099-DA reports the gains/losses of digital assets. Provide a copy of this form.	
40 Did you exercise any employer stock options?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	17		Include all exercise statements and employer supplied documentation to establish the tax basis.	
41 Did you acquire any employer restricted stock and make an IRC 83(b) election?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	17		Provide a copy of the election as this needs to be included with your federal tax return going to the IRS.	
42 Did you sell or exchange any <u>business</u> or <u>rental</u> real estate?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	17		Include form(s) 1099-S, 593 & settlement statements.	
43 Did you sell a principal residence? Was it used as a principal residence for at least 2 of the last 5 years? Was it ever rented? Was it acquired by any of the following: Inheritance or gift? IRC 1031 exchange? Reinvestment from a prior residence sold before May 7, 1997?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	17		Include ALL settlement statements.	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>				
	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Include IRS form 2119 if we didn't prepare your tax return.	
44 Does an <u>unrelated</u> party owe you money which became uncollectible in 2025?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	17		We will need the name, address, date of original loan, list of payments received and amount of loss.	
45 Did you incur a loss because of damaged or stolen property (including disaster or flood losses) that exceeds 10% of your income OR that was related to your business?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	17		Include specific details, including date of loss, original cost, insurance reimbursement, value at time of loss and description of item(s) damaged or stolen.	
46 Did you live in a Presidentially declared 2025 disaster area?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	17		https://www.fema.gov/disasters/disaster-declarations	

Personal Deductions and Credits

Question	Yes	No	Org.	Page	Inclusion Reminders and Other Information	
					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
47 Did you include in the organizer all fees paid to the DMV for personal vehicle registrations? Number of vehicles included	<input type="checkbox"/>	<input checked="" type="checkbox"/>	25		You can look up your DMV payments at: https://www.dmv.ca.gov/wasapp/FeeCalculatorWeb/vlfForm.do or find it on your DMV registration slip.	
48 Did you purchase a new vehicle, aircraft, or boat?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	25		Include the purchase contract.	
49 Did you have long-term care insurance or pay for long-term care services?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	25		If self-employed, use page 24 instead of page 25.	
50 Do you have documentation from your charities for ALL charitable contributions that you included in the organizer? Were any of these donations for a fundraising event (i.e. auction)?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	25		For donation substantiation requirements, go to our website and click F&P Highlights. "Goods or services received" are not deductible.	
51 Did your total NON -cash donations exceed \$500?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	26		We need a detailed list of descriptions, dates & charities.	
52 Did you donate a vehicle valued over \$500?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	26		Include form(s) 1098-C, original cost & purchase date.	
53 Did you donate any single non-cash item valued over \$5,000? This includes cryptocurrency, but does not include publicly traded securities or autos.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	26		A qualified appraisal is required. Include a copy of the signed appraisal.	
54 Did you move during 2025? If yes, date you moved _____ If yes, date your spouse moved _____	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Be sure to update your address on page 1 of the organizer, if not already updated. If you moved to a new state, all income needs to be allocated by state.	
55 Did you incur moving expenses due to a change of employment?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	27		No longer deductible for IRS, but some states allow.	
56 Did you pay interest on a higher education loan?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	24		Include form(s) 1098-E	
57 Did you pay for tuition, books or required computers for higher education?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	38		Include form(s) 1098-T	
58 Did you make a contribution to an HSA in 2025? If yes, amount contributed (if NOT already on W-2)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	32.1		Include form(s) 5498-SA (including annual earnings). Contribution deadline for 2025 is 4/15/26.	
59 Did you install any solar energy property or battery storage technology to your personal use residence? (Does not have to be your primary.)	<input type="checkbox"/>	<input checked="" type="checkbox"/>			2025 is the final year. Include all purchase documents and manufacturers' certifications.	
60 Did you receive a rebate for an energy efficient auto or any other energy efficient improvement or purchase in 2025?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	14.1		2025 is the final year. Also, NEW for 2025, "specified property items" require a PIN (provided by the manufacturer) in order to claim the credit. Be sure to provide us ALL paperwork.	
61 Did you purchase an electric drive/clean vehicle (used or new) between 1/1/25 and 9/30/25? If your vehicle was delivered after 9/30/25, you must have signed a binding contract and made a payment by 9/30/25 to qualify. If yes, did you receive the credit in advance at the time of sale?	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Include the entire purchase contract from dealer. NEW! The dealer must provide you with Form 15400, Clean Vehicle Seller's Report, to verify the vehicle qualifies for the credit.	

Mortgages and Debts

Question	Yes	No	Org.	Page	Inclusion Reminders and Other Information
62 Did you pay mortgage interest?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	25 p2		Include form(s) 1098 and lender 12/31/25 statement.
63 Did you refinance or take a home equity loan in 2025? If yes, term of new debt: <input type="checkbox"/> 15 yrs <input type="checkbox"/> 30 yrs <input type="checkbox"/> Other _____ If proceeds were received, provide a list of how the proceeds were used.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	25 p2		Include refinance final settlement statement, forms 1098 and lender annual activity statements. Cash received or debts paid off through a refinance have specific rules. Be sure to provide all details.
64 Did you pay interest on a home equity line of credit?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	25 p2		Include form(s) 1098 or equivalent and year-end balance(s).
65 Did pay interest on a passenger vehicle auto loan incurred after 12/31/24?	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Include form 1098-VLI provided by the lender.
66 Do your total outstanding mortgage balances on all personal residences exceed \$1 million (or \$750,000 if home was purchased after 12/15/17)? (This does not include rentals, business, or investment properties.)	<input type="checkbox"/>	<input checked="" type="checkbox"/>			<i>If yes, we need the balances for all loans at 12/31/25!</i> Provide year-end lender statements for all mortgages or provide a list of all loan balances at 12/31/25.

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[4. What elusive deep-sea creature was filmed alive in its natural habitat for the first time ever in 2025?](#)

**Remember - "more is better" when
deciding what documents to send us. If
you're not sure, send it anyway!**

Quiz Answers

1. Rage bait; 2. Jane Goodall; 3. Louvre Museum in Paris; 4. The colossal squid