

2025 Questionnaire

FIRST TIME CLIENTS ONLY (#1 & #2)

1. Please provide your full name and occupation.

Name: _____

Occupation: _____

2. If you have a spouse, please provide their full name and occupation.

Spouse Name: _____

Spouse Occupation: _____

MARITAL CHANGE

3. Did your marital status change this year?

Yes **No** **N/A**

If yes, what was the change in your marital status? _____

CHILDREN/DEPENDENTS INFORMATION CHANGE

4. Can you or your spouse be claimed as a dependent by another taxpayer?

Yes **No** **N/A**

5. If there is change of dependents information from the prior year, please explain the change. If adding a new dependent, please provide the full legal name, date of birth, and social security number.

Yes **No** **N/A**

If yes: _____

6. Did you or your spouse incur any expenses due to the adoption of a child?

Yes **No** **N/A**

7. Did you have any children that were under age 19 or were a full-time student under age 24 that had unearned income in excess of \$2,600?

Yes **No** **N/A**

8. Did you make any qualified contributions to a 529 or Coverdell Education Savings Plan? If yes, please provide a year-end statement showing the total contributions made during the year.

Yes **No** **N/A**

If yes, amount: _____

9. Did you make any distributions from a 529 or Coverdell Education Savings Plan? If yes, provide form 1099-Q.

Yes **No** **N/A**

10. Did you or your spouse pay for childcare for child(ren) under the age of 13 while you worked, looked for work, or were a full-time student? If yes, please provide year-end statements reflecting total childcare payments made during the year.

Yes **No** **N/A**

MOVED

11. If you moved this year, what was the reason for your move? (military service, job related, or other reason). If yes, please provide the documentation of the expenses incurred related to the relocation.

Yes **No** **N/A**

If yes: _____

BOUGHT, SOLD, OR OWNED PROPERTY

12. Did you purchase or sell your primary residence? If yes, please provide closing statements for all transactions.

Yes **No** **N/A**

13. Did you or your spouse own and occupy the homes as your principal residence for at least two years of the five-year period prior to the sale?

Yes **No** **N/A**

14. If you sold your primary residence, was any portion ever used for business purposes?

Yes **No** **N/A**

15. If you sold your primary residence, did you ever rent out the property?

Yes **No** **N/A**

16. Did you or your spouse withdraw any amounts from your Individual Retirement Account (IRA) or Roth IRA to acquire a principal residence?

Yes **No** **N/A**

17. Did you sell, exchange, or purchase any other real estate during the year?

Yes **No** **N/A**

18. Did you foreclose or abandon a primary residence or real property?

Yes **No** **N/A**

JOB CHANGE

19. If you changed jobs this year, please explain how your or your spouse's job(s) changed.

Yes **No** **N/A**

If yes: _____

20. Did you or your spouse receive unemployment compensation?

Yes **No** **N/A**

OWN OR OWNED A BUSINESS

21. Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, trust, or REMIC? If yes, please clarify which event was relevant to you and provide a name for the entity.

Yes **No** **N/A**

If yes: _____

22. Did you sell an existing business, rental property, farm, or any existing interest in a partnership or S corporation? If yes, please provide a brief summary of the transaction(s) and any relevant documents.

Yes **No** **N/A**

23. Did you utilize any portion of your home for business use (unrelated to your W-2 income from a business you do not own)? If yes, provide the total square footage of the home, square footage of the office, and separately provide a summary of home expenses for the year (mortgage interest, real estate taxes, insurance, utilities, HOA fees, repairs).

Yes **No** **N/A**

If yes: Total home square footage: _____
Office square footage: _____

24. If you or your spouse are self-employed, are you or your spouse eligible to be covered under an employer's long-term care plan at another job? If yes, how many months were you covered?

Yes **No** **N/A**

If yes: _____

RETIREMENT CONTRIBUTIONS OR DISTRIBUTIONS

25. Did you or your spouse receive deferred, retirement, or severance compensation?

Yes **No** **N/A**

26. Did you or your spouse make payment to a pension or profit sharing plan in 2025 or expect to make any payment in 2026?

Yes **No** **N/A**

27. Did you or your spouse receive payment from a pension or profit sharing plan in 2025 or expect to receive any payment in 2026 (other than through your payroll)?

Yes **No** **N/A**

28. Did you or your spouse contribute to a retirement plan (401(k), IRA, SEP, SIMPLE, or any other retirement plan) in 2025?

Yes **No** **N/A**

If yes, were any contributions made outside of payroll deductions for an employer sponsored plan?

Yes **No** **N/A**

29. Did you or your spouse withdraw funds or receive payment from a retirement (401(k), IRA, SEP, SIMPLE, or any other retirement plan) in 2025? If so, please provide form 1099-R reporting these distributions.

Yes **No** **N/A**

30. Did you or your spouse rollover any amount from a retirement plan, annuity plan, tax shelter annuity, or deferred compensation plan to another retirement plan? If so, please provide form 1099-R reporting this rollover.

Yes **No** **N/A**

31. Did you or your spouse contribute to a Roth IRA or convert an existing IRA into a Roth IRA? If yes, please provide a brief description of the transaction(s) – i.e. backdoor Roth contribution.

Yes **No** **N/A**

32. Did you or your spouse roll into a Roth IRA any distributions from a retirement plan, an annuity plan, tax shelter annuity, or deferred compensation plan?

Yes **No** **N/A**

33. Did you or your spouse make a qualified charitable distribution directly from an IRA?

Yes **No** **N/A**

OWN OR OWNED CRYPTOCURRENCIES

34. Did you engage in any of the following crypto activities in 2025? If yes – if you exchanged in crypto activity across multiple exchanges and/or wallets, you will need to accurately reconcile your crypto transactions. Any analysis or summarization performed by Thousand CPA will result in additional fees.

- a. Sold cryptocurrency (or NFTs) and received cash, or traded cryptocurrency (or NFTs) for another cryptocurrency (or NFTs);
- b. Spent cryptocurrency to purchase goods or services;
- c. Received cryptocurrency through wages, interest income, airdrops, hard forks, mining, or other rewards;
- d. Received and/or sent cryptocurrency as a gift;
- e. Purchased cryptocurrency using USD/EUR/OTHER;
- f. Transferred cryptocurrency between your own wallets & exchange accounts;
- g. Disposed of “financial interests” in digital assets?

Yes **No** **N/A**

GENERAL TAX QUESTIONS

35. Did you or your spouse have any debts canceled, forgiven, or refinanced?

Yes **No** **N/A**

36. Did you or your spouse pay any individual \$2,700 or more in household employee wages?

Yes **No** **N/A**

37. Did you, your spouse, or any dependent receive healthcare coverage from the Marketplace for 2025? If yes, provide form 1095-A.

Yes **No** **N/A**

38. Did you pay for or receive long-term care for yourself or your family?

Yes **No** **N/A**

39. Did you or your spouse have any transactions pertaining to a health savings account (HSA)? If so, please provide form 5498-SA reporting contributions made during the year and/or form 1099-SA reporting distributions taken during the year.

Yes **No** **N/A**

If yes, did you or your spouse receive a distribution from an HSA?

- Yes** **No** **N/A**

40. Did you or your spouse have any transactions pertaining to a medical savings account (MSA)?

- Yes** **No** **N/A**

If yes, did you or your spouse receive a distribution from an MSA?

- Yes** **No** **N/A**

41. Did you or your spouse receive income through any of the following methods (Bartering transactions, tips, prize money, gambling winnings, etc.)?

- Yes** **No** **N/A**

If yes, please state all applicable methods: _____

42. Did you or your spouse make any large retail purchases (cars, boats, etc.)?

- Yes** **No** **N/A**

43. Were you or your spouse notified or audited by the IRS or a State taxing agency?

- Yes** **No** **N/A**

44. If you are due refunds, would you like them electronically deposited to your bank account?

- Yes** **No** **N/A**

If yes, please fill out the information below:

Bank Name: _____

Routing #: _____

Account #: _____

45. Did you, your spouse, or your dependents incur any post-secondary education expenses, such as tuition? If yes, please provide form 1098-T.

Yes **No** **N/A**

46. Did you or your spouse pay any student loan interest in 2025? If yes, please provide form 1098-E.

Yes **No** **N/A**

47. Did you or your spouse withdraw any amounts from your IRA to pay for higher education expenses incurred by you, your spouse, your children, or grandchildren?

Yes **No** **N/A**

48. Did you or your spouse incur any casualty, damage, or theft losses?

Yes **No** **N/A**

If yes, was the casualty or loss attributed to a federally declared disaster?

Yes **No** **N/A**

49. Did you make any purchases or improvements for an energy-efficient vehicle or home improvements in 2025?

Yes **No** **N/A**

50. Did you purchase an energy-efficient vehicle prior to August 30, 2025?

Yes **No** **N/A**

51. Did you or your spouse turn age 73 and have money in an IRA or other retirement account without taking any distributions?

Yes **No** **N/A**

52. Did you or your spouse receive any grants of stock options from your employer, exercise any stock options granted to you or your spouse or dispose of any stock acquired under a qualified employee stock purchase plan?

Yes **No** **N/A**

If yes, please provide a brief summary and provide all supporting documents:

53. Did you or your spouse engage in any put or call transactions?

Yes **No** **N/A**

54. Did you or your spouse close any open short sales?

Yes **No** **N/A**

55. Did you or your spouse sell any securities not reported on Form 1099-B?

Yes **No** **N/A**

56. Did you refinance your primary residence?

Yes **No** **N/A**

57. Did you or your spouse claim a homebuyer credit for a home purchase in 2008?

Yes **No** **N/A**

58. Are your total mortgages on your first and/or second residence greater than \$750,000?

Yes **No** **N/A**

If yes, provide the principal balances and interest rate at the beginning and end of the year for each loan.

Balance 1/1/2025: _____

Balance 12/31/2025: _____

59. Did you or your spouse take out a home equity loan in 2025?

Yes **No** **N/A**

60. Do you or your spouse have an outstanding home equity loan at the end of the year?

Yes **No** **N/A**

If yes, provide the principal balance and interest rates at the beginning and end of the year.

Balance 1/1/2025: _____

Balance 12/31/2025: _____

61. Did you or your spouse receive any foreign income or pay any foreign taxes?

Yes **No** **N/A**

62. Were you or your spouse grantor or transferor for a foreign trust, have any interest in or a signature authority over a bank account, securities account, or other financial account in a foreign country?

Yes **No** **N/A**

63. Did you or your spouse create or transfer money or property to a foreign trust?

Yes **No** **N/A**

64. Did you or your spouse own any foreign financial assets?

Yes **No** **N/A**

65. Have you or your spouse received a punitive damage award for damages other than for physical injuries or illness?

Yes **No** **N/A**

66. Did you or your spouse make any gifts, including birthday, holiday, anniversary, graduation, education savings, etc., with a total (aggregate) value in excess of \$19,000 to any individual?

Yes **No** **N/A**

67. Did you or your spouse make any gifts of difficult-to-value assets (such as non-publicly traded stock) to any person regardless of value?

Yes **No** **N/A**

68. Did you or your spouse make any gifts to a trust for any amount?

Yes **No** **N/A**

69. Did you or your spouse assist with the purchase of any asset (auto, home) for any individual?

Yes **No** **N/A**

70. Did you reside in or operate a business in a Federally declared disaster area in 2025?

Yes **No** **N/A**

If yes, which Federally declared disaster and on what dates? _____

71. Did you or your spouse pay interest on a new passenger vehicle in 2025 that was assembled in the US? If yes, provide the Vehicle Identification Number (VIN) and provide a document reporting the interest paid in 2025.

Yes **No** **N/A**

72. Did you or your spouse receive income for overtime? If yes, provide your last paystub for 2025 showing overtime amounts and any additional documentation received from your employer.

Yes **No** **N/A**

73. Did you or your spouse receive income from tips? If yes, indicate which form the tips were reported on (W-2, 1099-K, 1099-NEC, or Form 4317) and provide a copy of the form(s).

Yes **No** **N/A**

If yes, what form(s): _____

ESTIMATED TAX PAYMENTS

The following questions relate to payment of estimated tax payments for the 2025 tax year. If you made any estimated tax payments, please include documentation of the estimated tax payments.

74. Did you make quarterly **federal** estimated tax payments? **Yes** **No**

	Amount	Date Paid
Federal Q1	_____	_____
Federal Q2	_____	_____
Federal Q3	_____	_____
Federal Q4	_____	_____

75. Did you make quarterly **state** estimated tax payments? **Yes** **No**

State if **not** Missouri: _____

	Amount	Date Paid
State Q1	_____	_____
State Q2	_____	_____
State Q3	_____	_____
State Q4	_____	_____