

2025 KTS Client Questionnaire

Taxpayer Name _____

Last 4 of SS# _____

Spouse's Name _____

Last 4 of SS# _____

Are there any changes to your address, phone number, or email? Yes No

If yes, please provide the updated information below:

Address: _____ Phone: _____

_____ Email: _____

New Dependent:

First Name: _____ Middle Initial _____ Last Name: _____

DOB _____ SS# _____ Relation _____

Did your marital status change during 2025? Yes No

If yes, please select your new marital status as of December 31st, 2025, from the options below:

Single Married Divorced Separated Widow(er)

The IRS is phasing out paper refund checks over the next year. If you are not currently utilizing direct deposit for refunds, the IRS will send you a letter requesting you provide them with banking information. If you choose not to provide the information, there will be a 6-week delay in receiving a paper check. We can update your banking information for a timelier refund during your tax prep using a voided blank check or the banking information provided below:

Name of Bank: _____

Checking Savings

Bank Routing Number: _____

Bank Account Number: _____

Did you receive, sell, send, exchange, or otherwise dispose of any financial interest in any virtual currency in 2025? Yes No *If yes, we will need the Consolidated 1099s from the brokerage accounts, or other documentation.*

At any time during 2025, did you or your spouse have signature authority over any foreign bank/investment accounts totaling \$10,000 or more? Yes No

If yes, you will need to prepare an FBAR through FINCEN. These accounts might be family owned, but you are able to sign. This might include Gambling and Fantasy Sports accounts.

Did you have any gambling income in 2025? Yes No

If yes, please inquire about our gambling worksheet.

Healthcare:

Did you receive healthcare through the ACA/Marketplace/Virginia Marketplace at any time in 2025? Yes No *If yes, a Form 1095-A must be provided.*

Did you participate in a Health Savings Account (HSA)? Yes No *If yes, you must provide a 1099-SA showing the gross distributions for 2025 in box 1.*

Education:

Did you, your spouse, or a dependent incur any tuition, fees, or book expenses that were required to attend college, university, or vocational school in 2025? Yes No
If yes, provide 1098-T and support for expenses.

Did you, your spouse, or dependent receive a distribution from a 529 Plan or Education Savings Plan in 2025? Yes No *If Yes provide Form 1099-Q.*

Did you make any contributions to a 529 Plan or Education Savings Plan in 2025?

Yes No *If yes, enter amount on the line provided: _____*

Did you pay any student loan interest in 2025? Yes No *If yes, provide Form 1098-E.*

Energy Credits:

Did you make any energy saving improvements to your home in 2025? Yes No
If yes, check all that apply and provide receipts showing amount spent on each category:
windows exterior doors central AC furnaces HVAC unit
water heater insulation heat pump biomass stove solar panels

Did you purchase an Electric Vehicle before 9/30/2025? Yes No *If yes, please provide the invoice/purchase agreement. We need the VIN_____*

New for 2025:

If you worked at a tip-based job in 2025, did you have any tip income that you didn't report to your employer and instead chose to report on Form 4137? Yes No N/A

Did you have overtime pay in 2025? Yes No *If yes, please provide your last paystub or another adequate form documenting those hours and rate of pay; it's not on your W-2.*

Did you finance a new vehicle in 2025? Yes No *If yes, please provide the vehicle VIN (on provided line), the purchase agreement, and a statement showing the total interest paid in 2025.*
VIN_____

Would you like a PDF copy of your tax return instead of a paper copy? Yes No

Taxpayer Signature: _____ **Date:** _____

Spouse Signature: _____ **Date:** _____