

## 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 31<sup>st</sup>, 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:** \_\_\_\_\_