2026 TAX QUESTIONNAIRE

(Please return when you submit your tax documentation)

Client Name: _____

Please check the appropriate box and include all necessary details and documentation.	**YES**	**NO**
Personal Information:		
* Did your marital status change during the year? If yes explain: _____		
* Did your address change from last year? If yes, please list the new address below.		
_____		
* Have you received an Identity Protection PIN (IP PIN) from the IRS on last year's return? If yes please provide a copy of the letter from the IRS. Returns cannot be electronically filed without this information.		
Dependent Information:		
* Were there any changes in dependents from the prior year due to a new birth? If yes please provide the following information: Legal Name of Child:_____ Date of Birth: _____ Social Security Number: _____		
* Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of $2,700?		
* Did you pay for child care while you worked or were a full-time student for any children under age 13? If yes please provide documentation which shows name, address, and amount paid to caregiver.		
Purchases, Sales and Debt Information:		
* Did you purchase, sell or exchange any investment real estate during the year? If yes provide a copy of the closing statement.		
* Did you purchase a new primary residence during the year? If yes please provide a copy of the closing statement.		
* Did you sell your primary residence during the year? If yes please provide a copy of the closing statement along with Form 1099-S if filed with the IRS.		
* Did you have any debts cancelled or forgiven during the year such as a home mortage, credit card or student loan debt?		
* Did you own any stock that became worthless during the year? If yes please provide documentation.		
Income Information:		
* Did you receive any foreign income from sources outside of investment accounts such as a foreign pension that is not reported to the IRS?		
* Did you receive any inhertied monies from either a Trust or Estate? If yes will a Form K-1 be received?		
* Did you receive any inhertied IRA's or Annuities during the year? If yes please explain.		
* Did you receive any unemployment benefits during the year? Please include tax form.		
* Did you receive any disability income during the year?		
* Do you expect a large fluctuation in income, deductions, or withholding next year? If yes, please explain:		
_____		
Retirement Information:		
* Did you receive any Social Security Benefits during the year? If yes, please provide **Form 1099-SSA.**		
* Did you make any contributions to a individual Traditional IRA during the year? If yes please list how much was contributed: **Traditional IRA Contribution: $_____**		
* Did you make any contributions to a individual Roth IRA during the year? If yes please list how much was contributed: **Roth IRA Contribution: $_____**		
* Did you designate any IRA distribution(s) to be paid to a qualified charity directly? If yes, please indicate the total amount contributed: $_____		

	YES	NO
Education Information:		
* Did you have any educational expenses during the year on behalf of yourself, your spouse, or your dependents? If yes, attach any Form(s) 1098-T and receipts for qualified tuition and related expenses.		
* Did you make any withdrawals from a 529 Plan Account during the year? If yes provide **Form 1099-Q.**		
* Did you contribute to a Michigan 529 Plan, MI Education Savings Plan (MESP) or MI Education Trust (MET) during the year? If yes please provide documentation showing contributions.		
* Did you pay any student loan interest during the year? If yes please provide **Form 1098-E.**		
Health Care Information:		
* Did or do you have Marketplace Coverage through healthcare.gov under the Affordable Care Act? If yes include **Form(s) 1095-A** as any credits received must be reconciled on your tax return.		
* Did you make any contributions to your Health Savings Account (HSA)? If yes please provide **Form 5498-SA.**		
* Did you use any HSA monies to pay for medical expenses? If yes please include **Form 1099-SA.**		
Miscellaneous Information:		
* Did you make any gifts of more than $19,000 to any individual? If yes please provide the name, address, relationship, and amount paid to each individual.		
* Did you have any financial accounts such as a bank account or investment account located in a foreign country? If yes please provide the country and the highest USD value of the account during the year.		
* Did you buy, sell, or exchange any virtual currencies (such as Bitcoin) outside of your investment accounts?		
* Did you use virtual currrency to pay for goods or services during the year?		
* Did you purchase a new vehicle during the year? If yes please provide the amount of sales tax paid.		
* Did you make any out-of-state purchases in which you did not pay Michigan sales tax?		
New Tax Law Updates for 2025-2028 (OBBBA):		
* Did you purchase and finance a new car in either 2025 or 2026 for personal use only? If yes, please include a statement from your bank or finance company which shows the amount of interest paid during the year. Also will need the following information: Year, Make & Model of Vehicle: _____		
* Did you make charitable donations during the year with either cash, check, or credit card? If yes, for those who cannot itemize can deduct up to $2,000 if filing married or $1,000 if filing single from your income. Please inlcude copies of donation receipts when submitting your tax documents.		
* Did you receive either Overtime or Tips from your employer that was not included on your W2 or 1099? If yes, please provide documentation showing the amount of OT or Tips paid.		

IN ORDER TO DETERMINE IF YOU ARE ELIGIBLE TO RECEIVE A POSSIBLE HOMESTEAD PROPERTY TAX CREDIT, PLEASE PROVIDE YOUR 2026 SUMMER AND 2026 WINTER PROPERTY TAX BILLS. TAXES NOT REQUIRED TO BE PAID TO BE ELIGIBLE FOR THE PROPERTY TAX CREDIT.