

## 2025 INDIVIDUAL RETURN QUESTIONNAIRE

Taxpayer Name: \_\_\_\_\_

Spouse Name: \_\_\_\_\_

**Please review each question and check YES or NO and provide additional information as necessary:**

**YES | NO**

1. Has your marital status changed?  
If YES, please specify:
2. Has your dependent information changed?  
If YES, please specify (name, SS#, DOB):
3. Did your immigration status change?  
If YES, please specify (citizenship, green card, visa type):
4. Did any individual on the return renew or receive a new ITIN?  
If YES, new ITIN:
5. Has your contact information changed this year? If YES, please provide us with the following:  
**Phone number change:** \_\_\_\_\_ **Email address change:** \_\_\_\_\_
6. Has your address changed this year? If YES, please provide us with the following:  
**Date address change:** \_\_\_\_\_ **New Address:** \_\_\_\_\_
7. Have you contributed to any retirement plan in 2025?
  - a. If NO, do you plan to by 04/15/2026?
  - b. If NO, would you like advice on this matter?
8. Did you receive any stock options from your employer? (qualified, restricted or incentive stock options). If YES, please provide supporting documents.
9. Do you have any income or loss outside of your resident state? If YES, which states:
10. Did you or your spouse earn or receive any **other** income in 2024 from:
  - a. Rental income? If YES, please fill out the attached *"Rental Spreadsheet"* per property and provide supporting documents.
  - b. Self-employment? If Yes, please provide support documents *and* fill out the attached *"Self-Employment Income and Expenses"* spreadsheet per business (ex: 1099's, etc.)

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ESHEL • AMINOV & PARTNERS LLP

Certified Public Accountants

KAPLAN & ASSOCIATES  
GROUP LLC

- c. Partnership, S Corporation or Corporation's in 2025? (please provide K-1's or 1099-DIV)
  - d. Did you or your spouse earn any Interest/Dividend/Capital Gain? If YES, please provide support.
    - i. Earned overseas? If YES, country
- 11. Did you make any estimated tax payments in 2025? Please provide supporting documents (Federal, State, dates and amounts).
- 12. Are you a business owner? If YES, please provide financial statements.
  - a. Did you file a NYS LLC (Form NY IT-204-LL)? If YES, please provide supporting documents.
  - b. Did the LLC receive any K-1's? If YES, please provide the supporting documents.
  - c. Did you file a business ownership information (BOI) filing with FinCEN? If YES, please provide confirmation.
- 13. Did you or your spouse own any Interest in FOREIGN financial assets (bank accounts, investment accounts, mutual funds, pension, retirement accounts, life insurance, etc.)? If YES, please fill out the attached "FBAR Spreadsheet".
- 14. Do you or your spouse have any signature authority over a FOREIGN financial account? If YES, please include on the attached "FBAR" Spreadsheet.
- 15. Did you or your spouse receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency? If YES, please provide support documentation.
- 16. Did you make any mortgage payments towards your primary residence? If so, please provide 1098 Mortgage Interest Statement from your financial institution.
- 17. Did you or your spouse **give** gifts to an individual that total \$19,000 or more (not a donation)? If YES, please provide detailed information to determine if a gift tax return is required.
- 18. Did you or your spouse **receive or inherit** assets from any foreign individual that totals more than \$100,000 (not a donation)? If YES, provide details for review.
- 19. Did you or your spouse own 10% or more of a Non-US Company? If YES, provide details for review.
- 20. Did you receive any unemployment compensation? If YES, please provide a 1099-G
- 21. Did you receive any IRS or tax agency notices 2025? If YES, please provide.
- 22. Did you receive any grants in 2025? If YES, provide detail in the comments section below and attach support document.

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- 25.** Did you obtain any health insurance through your states marketplace for you or your spouse? If YES, provide the Form 1095-A
- 26.** Did you purchase an electric Car in 2025, if YES, provide maker, model and cost and support documents.
- 27.** Did you purchase any solar systems or “energy safe” equipment in 2025, if YES, provide cost and support documents.
- 28.** Did you pay interest on a loan originating after December 31, 2024, to purchase a qualifying vehicle? \*A qualified vehicle is a car, minivan, van, SUV, pick-up truck or motorcycle, with a gross vehicle weight rating of less than 14,000 pounds, and that has undergone final assembly in the United States.
- 29.** Did you receive overtime payments exceeding \$12,500, f YES, provide cost and support documents.
- 30.** Did you receive tips exceeding \$25,000, f YES, provide cost and support documents.
- 31.** Did you or any member of your family request an IRS Identity Theft Protection Pin?If YES, Name and assigned Pin Number

**Please mention any additional information or changes you feel may be useful in the section below.**

**If you are interested in scheduling a tax planning meeting, please let your respective account manager know or contact our Office Manager at [info@eshelcpa.com](mailto:info@eshelcpa.com)**

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