

Brown Financial LLC

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

## 2025 Tax Questionnaire

If any of the following items on any of the **THREE** pages pertain to you or your spouse for 2025, please check the appropriate box and provide additional information if necessary.

### PERSONAL INFORMATION

Yes	No	
		Did your marital status change during the year?
		Did your address change? <b>Please provide your new driver's license.</b>
		Are you or your spouse a veteran who was honorably discharged?

### DEPENDENTS

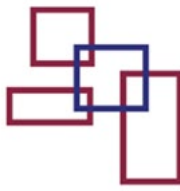
Yes	No	
		Were there any changes to your dependents, such as a new baby or your child claiming themselves on their taxes?
		Did you have any children whose total <b>investment</b> income was more than \$2,700? (Children under age 19 or full-time students under age 24 at the end of 2025.)

### INCOME

Yes	No	
		Have you received tax documents for all the income you earned this year?
		Did you receive any unemployment or disability income? If so, have you downloaded your 2025 1099-G from your state's website?
		Did you have debt canceled in 2025? If so, it is taxable income and you should receive an associated 1099-C form.

### RETIREMENT PLANS

Yes	No	
		Did you receive a <b>distribution</b> from a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.)? Did you receive your 1099-R?
		Did you make a <b>contribution</b> to a retirement plan (401(k), IRA, SEP, SIMPLE, Qualified Plan, etc.) <b><u>other than through your employer?</u></b> Please provide documentation of your contributions for tax year 2025.
		Did you <b>transfer or rollover</b> any amount from one retirement plan to another retirement plan? Did you receive your 1099-R form(s)?



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### BUSINESS

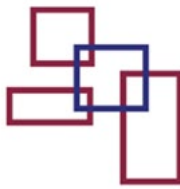
Yes	No	
		Did you start a business or farm, purchase rental or royalty property, or acquire an interest in a partnership, S corporation, or trust? If so, please provide copies of the formation documents or closing statements.
		Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.)? If you bought a business vehicle, we'll need to see the sales receipt.
		Did you use your car on the job ( <u>other than commuting to and from work</u> )? If so, did you track your business mileage?

### PURCHASES AND SALES

Yes	No	
		Did you buy or sell any stocks, bonds, or other investment property? If so, please provide your 1099-B or consolidated tax statement.
		Did you purchase or sell your home? (Please provide closing statements for each purchase and/or sale.) Did you refinance or take a home equity loan? (Please make sure to provide all 1098 forms.)
		Did you buy an electric vehicle or make any home purchases involving solar, wind, or geothermal energy? If so, we <b>will need to see your receipt</b> to determine if a credit can be claimed.
		Did you make any residential energy-efficient improvements? (Energy Star-rated windows, insulation, etc.) If so, we <b>will need to see your receipt</b> so we can determine if a credit can be claimed.
		Cryptocurrency – During 2025, did you (a) <b>receive</b> (as an award or payment for property or services) or (b) <b>sell, exchange, gift,</b> or otherwise dispose of a digital asset? For each account/wallet/exchange, please provide the associated 1099 tax form, or if unavailable then a year-end statement.

### EDUCATION

Yes	No	
		Did you, your spouse, or a dependent incur any tuition expenses to attend a college, university, or vocational school? If so, we will need form 1098-T from the school in order to claim any deductions.
		If yes, have you previously received the American Opportunity Tax Credit (AOTC)? How many years have you claimed this credit? (Maximum 4 years of credit for undergrad only, with income limits.)
		Did you receive a distribution from a 529 Education Savings Account or a Qualified Tuition Program? Please provide form 1099-Q.



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## HEALTH CARE COVERAGE

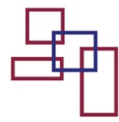
Yes	No	
		Did you apply for <b>marketplace health insurance</b> on Get Covered NJ, Pennie or another state exchange? If so, please save your Form <b>1095-A</b> .
		Did you take a distribution from, or make a contribution to, an HSA? If so, did you receive the associated 1099-SA and 5498-SA?

## ESTIMATED TAXES & LOOKING FORWARD

Yes	No	
		Did you apply an overpayment of 2024 taxes to your 2025 estimated tax (instead of being refunded)?
		Did you make quarterly estimated tax payments to IRS or any states? We need to know exact amounts and dates paid.
		Do you anticipate any major changes during 2026 that would impact your income taxes? (Job change, marriage, expecting a baby, etc.)
Apply as estimate	Refund	If you have an overpayment of 2025 taxes, do you want the excess applied to your 2026 estimated tax (instead of being refunded)?

## MISCELLANEOUS

Yes	No	
		May the IRS discuss your tax return with your preparer?
		For direct deposit of refunds or payment of taxes, <b><u>did your bank account change</u></b> from the one used on your 2024 tax return?
		Did you make monetary donations to a registered nonprofit, such as a church or 501(c)3 organization? Please provide your receipts/statement.
		Did you finance a <b>brand-new personal vehicle purchase</b> in 2025? You may receive a new tax doc called 1098-VLI. If you don't get that form, we'll need other proof of loan interest paid, which may be deductible.
		Did you have any financial accounts in a <u>foreign country</u> , such as a bank account, investment account, etc.?
		Did you receive a distribution from, or were you the grantor of or transferee of, a <u>foreign</u> trust?
		Did you or your spouse gift more than \$19,000 to any individuals, or gift money to a trust?
		Did you receive a tax notice from the IRS or any states? Please provide copies of those notices.
		What is your <b>preferred contact method</b> ? (email, phone call, text)



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## 2025 Tax Document Checklist

Please upload, email, or bring the following documents to your tax appointment, as applicable:

- ☐ Driver's license or other photo ID
- ☐ W2
- ☐ Last paystub of the year
- ☐ Social Security 1099
- ☐ 1099-B            Investment/Stock sales
- ☐ 1099-INT        Interest income
- ☐ 1099-DIV        Dividend income
- ☐ 1099-R           Retirement distribution income
- ☐ 1099-NEC       Non-employee compensation
- ☐ 1099-G           Unemployment compensation
- ☐ 1099-C           Cancellation of debt
- ☐ 1099-K           Sales through 3<sup>rd</sup> party such as Etsy, eBay, Venmo, PayPal, Square, etc
- ☐ 1095-A           Healthcare form only if purchased through healthcare marketplace
- ☐ 1098-E           Student loan interest paid
- ☐ 1098-T           Tuition paid
- ☐ 1098              Home mortgage interest
- ☐ HUD-1            Closing statement if you have sold or purchased a property
- ☐ K-1                For members of partnerships, S-corps, or beneficiaries of trusts
- ☐ W-2G             Gambling winnings
- ☐ HSAs have 2 associated forms: 1099-SA and 5498-SA
- ☐ Property tax card or tax receipts, if not paid through mortgage escrow
- ☐ Year-end cryptocurrency statement or CSV file, or 1099 form if available

### Children:

- ☐ Childcare statements or receipts – day camp counts! (Tax deduction only applies for children aged 12 and under as of 12/31/2025)
- ☐ Birth certificate and Social Security card

Please provide annual totals instead of receipts (but save the receipts for your records):

- ☐ Out-of-pocket \$ paid for medical care, dentists, lab work, prescriptions, eyeglasses, or contacts
- ☐ Out-of-pocket \$ paid for supplemental health insurance or long-term care insurance
- ☐ Donations to **qualified** charities (MUST be a 501(c)(3) or equivalent, GoFundMe may not count)
- ☐ Medical mileage and/or charitable mileage

### Investment Accounts:

If you have investment accounts with sale transactions, your 1099-B might be revised in February, and sometimes they are amended after the April tax deadline. Depending on your level of investment activity, we may recommend filing an extension to allow time for amended investment 1099s to arrive.