

**Client Questionnaire for Heidi The Tax Lady LLC / dba KTL & H Tax Prep**

Please answer **all questions** below and return with your 2025 tax documents for preparation. You may use the backside or attach another page if you need to provide more information. **Write Clearly.**

1. Name: \_\_\_\_\_

2. Phone/Address: \_\_\_\_\_

3. Marital status/Filing status: \_\_\_\_\_

4. Dependents (if changed from previous year): \_\_\_\_\_

5. Email: \_\_\_\_\_ (Annual mailer by email? Y or N)

6. # Of W2's: \_\_\_\_\_

7. # Of 1099's (**inc. type**): \_\_\_\_\_

8. Received Unemployment? (*Sign in to your online account to obtain a PDF 1099-G*): \_\_\_\_\_

9. Did you sell goods/accept payments on Venmo/PayPal etc.? (*Check your account for a 1099-K. Also check mail in Feb/Mar*) Please explain: \_\_\_\_\_

10. Do you have **any other income** to report other than listed above (*this includes any business income legal or otherwise, hobby income, gambling, etc.*) if so please explain and include all information: \_\_\_\_\_

11. Did you sell any Business or Property in 2025? If so, please explain and include proper documentation: \_\_\_\_\_

12. Did you receive, sell, exchange, or otherwise dispose of any financial interest in virtual currency: \_\_\_\_\_

13. If you gave to charity, please list and include receipts, cancelled checks, bank statements showing payments, and/or slips from goods donated with itemized listing of goods donated: \_\_\_\_\_

14. Did you do any energy saving improvements to your primary home? Please explain and include appropriate paperwork: \_\_\_\_\_

15. If you own your home, please include total amounts paid for 2025 property/school taxes. Please add penalty and interest paid for late payments separately: \_\_\_\_\_

16: Please provide your checking/savings account routing/account # for payments or refunds (specify which account, voided checks will do as well): \_\_\_\_\_

17. Did either taxpayer or spouse receive a new driver's license since last year's filing (if so, include photocopies of front and back of license): \_\_\_\_\_

**\*If there is anything else that you need to advise me, other than listed above, so that I may properly prepare your tax return please make notes on the reverse side. Thank you so much.**