

2025 Intake Questionnaire



CONTACT INFORMATION

Taxpayer First Name	M.I.	Last Name	
Taxpayer Phone	Taxpayer Email		
Taxpayer Preferred Name		Spouse Preferred Name	
Spouse First Name	M.I.	Last Name	
Spouse Phone	Spouse Email		
Primary residence address			Unit #
City	County	State	Zip
Current mailing address (if different)			Unit #
City	County	State	Zip

GENERAL INFORMATION

1. How would you like us to contact you about your tax return? ☐ Phone ☐ e-mail
2. Marital Status on 12/31/2025: ☐ Single ☐ Married
3. ☐ Yes ☐ No Were there any changes in dependents? Explain: _____
4. ☐ Yes ☐ No Did your address change during the year? Date of move: _____
5. ☐ Yes ☐ No Oregon Department of Revenue is requesting voluntary self-identification of your race and ethnicity. Check yes if you would like to participate, or check no if you would like to opt out of the voluntary program.

INCOME AND SALES

6. Please check all that apply:

- | | | | |
|---|--|---|---|
| <input type="checkbox"/> Wages / employment | <input type="checkbox"/> Tip income | <input type="checkbox"/> Sale of property | <input type="checkbox"/> Jury duty |
| <input type="checkbox"/> Pension / retirement | <input type="checkbox"/> Overtime pay | <input type="checkbox"/> Installment sale | <input type="checkbox"/> Alimony |
| <input type="checkbox"/> Social Security / Disability | <input type="checkbox"/> Self-employed / Gig | <input type="checkbox"/> Inheritance | <input type="checkbox"/> Rollover |
| <input type="checkbox"/> Bank interest | <input type="checkbox"/> Hobby income | <input type="checkbox"/> Foreclosure / repossession | <input type="checkbox"/> IRA Conversions |
| <input type="checkbox"/> Stock investments | <input type="checkbox"/> Rental income | <input type="checkbox"/> Canceled debt | <input type="checkbox"/> Backdoor Roth Conversion |
| <input type="checkbox"/> Employee stock options | <input type="checkbox"/> Farming / fishing | <input type="checkbox"/> Prizes or awards | <input type="checkbox"/> Foreign income |
| <input type="checkbox"/> Unemployment income | <input type="checkbox"/> K1 Passthrough income | <input type="checkbox"/> Gambling or lottery | <input type="checkbox"/> Other income |

7. ☐ Yes ☐ No ☐ N/A If employed, do you participate in the Oregon Saves retirement program?
8. ☐ Yes ☐ No Did you own any virtual currency / cryptocurrency? e.g. Bitcoin, Ethereum, Dogecoin, etc.
Check all that apply in 2025: ☐ Acquire / Buy ☐ Send / Pay for services ☐ Trade / Exchange / Sell

DEDUCTIONS AND CREDITS

9. Please check all that apply:

- | | | | |
|--|---|--|--|
| <input type="checkbox"/> Alimony paid | <input type="checkbox"/> Medical expenses | <input type="checkbox"/> Property taxes | <input type="checkbox"/> College tuition |
| <input type="checkbox"/> K-12 Teacher expenses | <input type="checkbox"/> Mortgage interest | <input type="checkbox"/> Donations - items | <input type="checkbox"/> Childcare expenses |
| <input type="checkbox"/> Retirement contribution | <input type="checkbox"/> HELOC interest | <input type="checkbox"/> Donations - money | <input type="checkbox"/> OR 529 College Savings |
| <input type="checkbox"/> Student Loan Interest | <input type="checkbox"/> RV / Boat interest | <input type="checkbox"/> Volunteer miles | <input type="checkbox"/> Political contributions |
| <input type="checkbox"/> Health Savings Account | <input type="checkbox"/> Car loan interest (new 2025 purchase of USA-made or assembled vehicle) | | |

10. ☐ Yes ☐ No Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? Provide closing statement and all Forms 1098.

11. ☐ Yes ☐ No Did you acquire health insurance through the [HealthCare.gov](https://www.healthcare.gov) marketplace? (Do not include OHP/CHPW) Provide Form(s) 1095-A

12. ☐ Yes ☐ No Did you purchase a new or used electric vehicle that qualifies for a tax credit?

13. ☐ Yes ☐ No Did you make any high-efficiency energy improvements to your main home?
Check all that apply: ☐ Solar ☐ Furnace/heat pump ☐ Water heater ☐ Windows/doors ☐ Insulation

MISCELLANEOUS

14. ☐ Yes ☐ No Do you own property in Portland other than your primary residence?

15. ☐ Yes ☐ No Did you pay estimated taxes or apply an overpayment of last year's taxes to your current year's estimated tax? Provide record of amounts and dates paid to each taxing agency.

16. ☐ Yes ☐ No Do you have an account in a foreign country? e.g., bank account, securities, pension, trust, etc.

17. ☐ Yes ☐ No ☐ N/A If you have any dependents, did any of them earn income from wages, gig work, self-employment, interest, or dividends?

18. ☐ Yes ☐ No Were you notified or audited by the Internal Revenue Service or a State taxing agency?
Provide copies of all letters you received.

COMMENTS / QUESTIONS

[illegible]

2025 Engagement Letter



This letter is to inform you, the taxpayer, of the services we will provide you, and the responsibilities you have for preparation of your tax return.

TAX RETURN PREPARATION

- We will prepare your 2025 Form 1040, U.S. Individual Income Tax Return, and applicable state and local tax return(s) based on information you provide. Services for preparation of your returns do not include auditing or verification of information provided by you.
- This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- Assisting you with your compliance with the Corporate Transparency Act, including beneficial ownership information reporting, is not within the scope of this engagement.
- The tax return preparation fee does not include bookkeeping. Additional fees apply for these services.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- Preparation fees do cover limited assistance and consultation during the year. Detailed consultations, calculations, and tax planning requested by you will be billed separately.
- The engagement to prepare your 2025 tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and your tax returns in a secure place for at least seven years. You may be assessed a fee if you request a duplicate copy in the future.

TAXPAYER RESPONSIBILITIES

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS, State, or local tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the returns carefully before signing to make sure the information is correct.
- Fees must be paid before your tax returns are delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer may be required.

By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers must sign.

Taxpayer Signature

Taxpayer Name (please print)

Date

Spouse Signature

Spouse Name (please print)

Date

PRIVACY POLICY

The nature of our work requires us to collect certain nonpublic personal information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment.

Under our policy, all information we obtain about you will be provided by you or obtained with your permission. Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. Please contact us with any questions regarding our privacy policy.