

MELISSA M. WETZEL, CPA, P.C.

P.O. BOX 990, 301 WEST MAIN STREET, EMMITSBURG MD 21727

301-447-3797 **info@melissawetzelcpa.com** FAX: 301-447-3755

Individual Questionnaire for 2025

TAXPAYER _____ email: _____

SPOUSE: _____ email: _____

BEST NUMBER TO CALL: _____

TAXPAYER PHONE : _____ SPOUSE PHONE (MUST HAVE) _____

Please circle "Y" for Yes or "N" for No

Personal Information

- Y N Did your marital status change during the year? (Need agreement/divorce papers)
- Y N Did someone pass this past year? If so we need copy of Death Certificate and Letter of Administration (if applicable)
- Y N Was there a birth of a child? (Need copy of birth certificate and social security card).
- Y N Did your residence change during the year?(If yes, Date Moved: _____)
(New Address: _____)
- Y N Are you and/or your spouse 65 or over?
- Y N Are you a Retired Public Safety Officer? If yes, need health insurance paid for the year: _____
- Y N **Did you receive a PIN(s) from the IRS (anti identity theft PIN)? If yes, attach IRS letter CPO1A**
- Y N Are you (your spouse) a U.S. Citizen? If No, Resident Alien or Non-Resident Alien

Dependent Information

- Y N **Do you have dependents on your return? Provide proof of their address (ie school record)**
- Y N Were there any changes in dependents from the prior year? (Need Proof and explain)
- Y N Did you provide over half the support for another person not claimed as a dependent?
- Y N Did you pay child care for a dependent (babysitting, daycare)? Attach Form W-10 with Amount Paid

Purchases, Sales and Debt Information

- Y N Did you purchase a new Vehicle? **Provide VIN # and Interest Proof and Purchase Agreement**
- Y N Did you start, dispose of, or acquire interest in a business during the year? **(attach paperwork)**
- Y N Did you sell, exchange, or purchase any real estate during the year? **(attach closing statement(s) original pur. & new)**
- Y N Did you dispose of any stock during the year? (attach original cost and sale price with dates)
- Y N Did you take out a home equity loan, line of credit or refinance any property this year? **(attach paperwork)**
- Y N Are you repaying the \$7,500 first time home buyers credit from 2008 (2010-2025)? **Last Year!!**
- Y N Did you file Bankruptcy in 2024? Chapter 7 (Full) or Chapter 13 (Repayment Plan) **Attach Bankruptcy Letter**
- Y N Did you receive debt forgiveness in 2024? **Provide 1099-A or 1099-C**

Income Information

- Y N Do you have any W-2's? **Attach W-2 and year end paystub**
- Y N Did you work overtime? **Provide your year-end paystub**
- Y N Did you make tips? **Provide W2 or if self-employed provide us with your tip log.**
- Y N Did you receive Social Security benefits? **Provide 1099-SA**
- Y N Did you receive distribution from any pension, profit sharing or IRA money? **Attach 1099-R** Distribution from ROTH (check) _____ OR contribute to a Back-Door ROTH (check) _____
- Y N Did you rollover from one Retirement Plan to another? **(provide PROOF)**
- Y N Did you receive any unemployment income? **Attach 1099-G**
- Y N Did you cash in any U.S. Savings bonds or have any interest income? **Attach 1099-INT from the Bank**
- Y N Do you have any gambling winnings? **Provide W2-G and proof of gambling losses**
- Y N Did you receive damages paid on account of personal injuries that are not physical injuries?
- Y N Did you receive or pay alimony (not child support)? If yes, amount _____ Date of Agreement _____
- Y N Did you receive executor fees or jury duty fees? If yes, amount \$ _____
- Y N **Do you personally handle any Foreign Accounts? Attach documents**
- Y N **Do you have a financial interest in any virtual currency? (Ex: bitcoin) Attach documents**
- Y N **Do you receive Solar Renewable Energy Credit? (1099 MISC) or \$ _____**

(MUST COMPLETE BACK)

TAX YEAR 2025

Credit (deduction) Information

- Y N Did you incur any adoption expenses in 2025?
- Y N Did you install geothermal heat pumps or solar/wind energy systems into your personal residence, second or vacation home? (Need a copy of the invoice)
- Y N Did purchase an electric or hybrid vehicle by 9/30/25? (Need a copy of the Sales Receipt)
- Y N Do you have a Flex Spending account at work? What does it pay for? _____ Amount\$ _____
- Y N Did you purchase energy efficient residential items? (Need receipt)

Schedule A Itemized deductions

- Y N Are you a teacher or school administrator who provided school supplies in your job? If yes, **Amount \$** _____
- Y N Did you have educational expenses for you or your dependents? **Attach 1098-T and receipts.**
- Y N Did you or your dependent receive scholarships or employer-provided educational assistance?
- Y N **Did you pay any student loan interest this year? Attach 1098-E (Might be zero this year)**
- Y N Did you pay sales tax on a car, boat, motor home, manufactured home, truck, motorcycle or plane purchased for personal use (new or used)? If yes, **Amount: \$** _____
- Y N **Do you own your personal residence where you live? Provide property tax amount paid in 2025)\$** _____
- Y N Do you have a mortgage or home equity loan? **Provide 1098** (Mortgage Interest Statement)
- Y N **Do you pay PMI mortgage insurance?**
- Y N Review your paystub: Did you pay union dues? (PA Residents Only) \$ _____ (**Attach last paystub of 2025**)
- Y N Review your paystub: Did you make charitable contributions thru work? \$ _____ (**Attach last paystub 2025**)
- Y N Did you make any charitable contributions? **Need receipts - even for cash!**
- Y N Are you keeping track of charitable miles? If yes, **how many for 2025:** _____ **Explain**
- Y N **Did you make any non-cash donations? If yes, need donation receipt, list of items and picture of items.**

Health Insurance Information

- Y N **Did you get a credit on your insurance through the market place? If yes - Provide 1095-A as proof?**
- Y N **Do you think your medical expenses exceed more than 7.5% of your income? (Bring detail)**
- Y N Are you keeping track of your medical miles? If yes, **how many miles for 2025:** _____
- Y N Do you have a Health Savings Account(HSA)? If yes, **attach 1099-SA showing distributions and 5498-SA showing contributions.**
- Y N **Do you want to max out your HSA before 04/15/2026 for a tax deduction on your 2025return?**
Contribution Max - Family \$8,550 Single \$4,300
- Y N Do you have self-employed Health Insurance? If yes, **cost for insurance for 2025?** _____

Miscellaneous Information

- Y N Did you make gifts of more than \$18,000.00 to any individual last year?
- Y N Did you make any **Roth, traditional, SIMPLE OR SEP IRA** contributions? If yes, circle which one. Bring Proof
- Y N Have you ever made a non-deductible IRA contribution? **Bring Proof Did you then transfer to a Back-Door Roth? If so, provide proof of transfer**
- Y N Did you receive correspondence from federal, state or local tax authorities that I should know about or review? If yes explain: _____
- Y N Do you want to allocate \$3 to the Presidential Election Campaign Fund?
- Y N Do you operate a self-employed business? If yes, we might have other questions
- Y N Do you have a Self-Employed Home Office? If yes, we might have other questions
- Y N Did you make estimated payments throughout the year? Check all that apply:
IRS _____ STATE _____ LOCAL _____ (Bring proof of to whom, date paid and amount paid)
- Y N Next Year's Taxes: Do you expect significant changes in income, expenses or dependents? If yes, explain: _____
- Y **IRS will only allow electronic payments and deposits.**
- Y N **Use the same direct deposit/auto-withdrawal information as last year? (Y=yes N=no)**
- Y N **If you answered NO to above question, please provide your Direct Deposit/Auto-withdrawal routing number & account number (VOIDED CHECK or other documentation).**

State Information

- Y N Do you have withholding from more than one state? If yes, what other state(s) _____
- Y N Did you contribute to a 529 (college) Plan? If yes, what state plan and amount: _____
- Y N Are you retired from the military (Maryland Deduction)?
- Y N Are you a Retired Law Enforcement Officer or Fire, Rescue, or Emergency Services Personnel (MD)?
- Y N Did you qualify for the LOSAP (Length of Service Awards Program) credit (MD)? Attach and miles _____
- Y N PA Residents: Did you make untaxed purchase from out-of-state retailers (Ex: on internet)?
If yes, bring purchase receipts or amount.