

DAVID C. BRYANT, CPA - INDIVIDUAL INTERVIEW - 2025 INCOME TAX RETURN

Preferred Contact Name:	Preferred Contact Phone Number:
Occupation(s):	Preferred Contact Email Address:
Home/Mailing Address:	

If you are a new client, please check this box and complete the additional "New Client" checklist. ☐

➤ ***Please provide a voided check or write your bank account information below.***

Bank Name: _____ ***Acct. Type:*** _____ ***Routing #:*** _____ ***Account #:*** _____

➤ ***If the requested bank information above is NOT provided and you receive a refund, it will be sent to you as a check via mail OR if you owe money, payment vouchers will be printed for you to mail a check/money order.***

Yes	No	Question / Response
		Did you receive an identity protection PIN (IP PIN) from the IRS for the 2025 tax year? <i>If YES, please provide the letter that contains the PIN. *Your 2024 PIN will NOT work.</i>
		Have you received a new state ID/driver's license since filing last year's tax return? <i>If YES, please provide.</i>
		Has your filing status changed? <i>If YES, please select a box below:</i>
		<input type="checkbox"/> Married (Date: _____) <input type="checkbox"/> Divorced (Date: _____)
		<input type="checkbox"/> Taxpayer Death (Date: _____) <input type="checkbox"/> Spouse Death (Date: _____)
		Is your filing status Head of Household? <i>If YES, please visit the 2025 Tax Year section of our website for the required questionnaire.</i>
		Did you pay or receive alimony? <i>If YES, date of divorce:</i> _____
		Did you work in a different state than you reside?
		Did you move in 2025? <i>If YES, please provide the date your address changed:</i> _____
		Did you purchase/sell/refinance a house in 2025? <i>If YES, please provide your closing disclosure; one for the SALE of your previous home AND one for the PURCHASE of your new home.</i>
		If you have a home equity loan or line of credit, was it used to buy or improve a 1 st or 2 nd residence? <i>If NO, what was it used for?</i> <input type="checkbox"/> consolidate debt <input type="checkbox"/> buy car/boat <input type="checkbox"/> other: _____
		Did you finance the purchase of a new vehicle in 2025? <i>If YES, please provide the purchase agreement, a year-end finance statement showing the total interest paid in 2025, and the VIN #</i> _____
		Did you receive compensation in the form of tips and/or overtime? <i>If YES, please provide statement from employer(s).</i>
		Did you have insurance through the Health Insurance Marketplace and receive a subsidy towards the premium (based on income) at any time in 2025? <i>If YES, please provide 1095-A.</i>
		Have you had any debts cancelled or reduced (as part of a debt negotiation/relief program or bankruptcy)? <i>If YES, we will need a 1099-C.</i>
		➤ Was it part of bankruptcy? <i>If YES, we will need the bankruptcy documents.</i>
		Did you contribute to an IRA, other than through your employer? <i>If YES, complete below:</i>
		<u>Taxpayer</u> <input type="checkbox"/> Traditional (Amount: _____) <input type="checkbox"/> Roth (Amount: _____)
		<u>Spouse</u> <input type="checkbox"/> Traditional (Amount: _____) <input type="checkbox"/> Roth (Amount: _____)
		Did you take a distribution from an IRA, 401K, or 403B? <i>If YES, mark which, and how many accounts:</i> <input type="checkbox"/> IRA <input type="checkbox"/> 401K <input type="checkbox"/> 403B
		➤ Was any part of this distribution paid <i>directly</i> to a charity?
		Did you convert an IRA to a Roth IRA or perform a back door Roth IRA? <i>If YES, please describe and provide documentation.</i>
		Did you buy or sell stock?
		Did you buy or sell <i>company</i> stock in 2025 from an employer that you work or worked for?
		Did you contribute to a Health Savings Account outside of your employer (not an FSA or HRA)?
		Did you receive distributions from a Health Savings Account (not flex spending)? <i>If YES, was all money used for medical expenses?</i>

Yes No

Question / Response Continued

Do you pay for long-term health care (not health insurance; only long-term care)? **If YES, please provide amount paid for 2025:**

Are you an active member of the Armed Forces or Reservist?

Are you **retired: MILITARY POLICE FIREFIGHTER** ? **Please mark all that apply.**

Do you have a financial interest in or signature authority over any foreign financial accounts?

Did you **BUY SELL RECEIVE** or **SEND** cryptocurrency in 2025?

Please mark all that apply and provide us with more information regarding the transactions.

Did you start a new business during 2025?

Did you purchase rental property during 2025? **If YES, see the question below.**

Do you own rental property? **If YES, please visit the [2025 Tax Year](#) section of our website for the required questionnaire.**

Did you sell an existing business, rental, or other property during 2025?

Did you purchase a new or used plug-in electric vehicle in 2025? **If YES, please provide the buyer's agreement.**

Did you make an energy efficient improvement to your home in 2025? **If YES, please provide documentation. *Please visit the [2025 Tax Year](#) section of our website for general examples.**

Did you gift anyone \$19,000 or more in dollars or property? **If YES, a gift tax return is needed.**

Was there a change in your dependents? **If YES, please select a box below:**

☐ **Add Dependent** Name: _____ Date of Birth: _____ SSN: _____

☐ **Remove Dependent** Name: _____ Reason for Removal: _____

Do you have a dependent that filed their own tax return? **If YES, please provide a copy.**

Do you have a child, aged 17-23, whom is a student and had lived with you for **over** half the year (whether away at college or not) **OR** a non-child relative that you supported?

Did you pay childcare costs for a dependent child under age 13 so you could work? **If YES, please complete the "Childcare Information" section below.**

Did you or your child go to college full time (6 credits) for at least one semester? **If YES, please provide tuition (1098-T), room, board, supplies, etc. and mark which year of college:**

☐ **Freshman** ☐ **Sophomore** ☐ **Junior** ☐ **Senior**

Did you make any contributions to an education savings or 529 plan account? **If YES, what state?** _____

Were distributions from a 529 plan used to pay for your child's tuition, room, board, etc.? **If YES, please provide 1099-Q and summary of expenses paid outside of tuition.**

Did you make any estimated tax payments (not the same as withholding on your W2)? **If YES, please complete the section below.**

Would you like estimated tax payment figures? *They will be based on your 2025 tax situation only. They are to pay estimated tax liabilities quarterly, for the **current** tax year, 2026. These are in **addition** to any withholdings you may already have via a W-2.*

Estimated Tax Payment Information

Date of Payment	Amount	Paid to: Fed/State/Local	Date of Payment	Amount	Paid to: Fed/State/Local

Childcare Information

Child's Name	Provider Name	Address	EIN	Cost

By signing below, you verify that all data given to David C. Bryant, CPA, may be used in preparation of your 2025 individual income tax returns.

Signature of Interviewee

Date of Interview