2025 INCOME TAX QUESTIONNAIRE

Full Name: ______________________________
Last *First* *M.I.*

TAXPAYER INFORMATION

New clients fill in all information, existing clients fill in changes only

Address: ______________________________
Street Address *Apartment/Unit #*

____
City *State* *ZIP Code*

Phone-Cell#: (   ) ____________________ **PA resident Municipality:** ____________________

SS# ____________________ **PA resident School District:** ____________________

Date of Birth: ____________________

Occupation: ____________________

E-Mail address: ______________________________

SPOUSE/DEPENDENT INFORMATION

(New clients fill in all applicable information; existing clients please fill in changes only)

Spouse Full Name: ______________________________
Full Name *Date of Birth* *Social Security Number*

Spouse Email: ____________________ **Spouse Occupation:** ____________________

Dependent #1: ______________________________
Full Name & Gender *Date of Birth* *Social Security Number*

Dependent #2: ______________________________
Full Name *Date of Birth* *Social Security Number*

Dependent #3: ______________________________
Full Name *Date of Birth* *Social Security Number*

All required information and documents must be received by <u>Friday, March 20th, 2026</u>. If not, it will be mandatory for Blue Line to pursue an extension of the due date of your returns and your taxes will be finalized and filed after April 15th, 2026.

Please Initial: ____________

YOUR NAME(S): ____

Bank information for direct deposit of any Federal and State refunds:

Do you want to electronically transfer funds to/from your bank account for any refunds/taxes owed? ☐ YES ☐ NO

Bank name: ___________________ ***Routing #:***________________________ ***Account #:***________________________________

Please specify: ☐ Checking ☐ Savings

Please answer these questions and supply additional documentation as needed:	**YES**	**NO**
Did your primary residency address change in 2025? ***If so, please provide the new address on page 1 of this questionnaire.**	☐	☐
Did you have Health Insurance provided through the marketplace (Healthcare.gov) in 2025? ***If so, please provide the 1095-A form.**	☐	☐
Did you have a pre-tax health insurance deduction from your paycheck in 2025? ***If so, please provide the Year End Paystub from your employer**	☐	☐
Did you, and/or your spouse, receive any unemployment compensation in 2025? ***If so, please provide form 1099-G**	☐	☐
Did anyone in your household attend college, university, or technical school in 2025? ***If so, please provide Form 1098-T**	☐	☐
Did you, and/or your spouse, make contributions to a 529 school tuition plan in 2025? ***If so, list Beneficiary(s):____________________/_______________ Amt(s):__________/_________**	☐	☐
Did you make any withdrawals from an education savings account and/or a 529 plan to pay for education expenses in 2025? ***If so, please provide Form 1099-Q**	☐	☐
Did you, and/or your spouse, pay interest on any student loans in 2025? ***If so, please provide Form 1098-E**	☐	☐
Did you and/or your spouse, take a distribution from a pension, annuity, or retirement plan in 2025? ***If so, please provide the Form 1099-R**	☐	☐
Did you sell and/or buy any real estate in 2025? ***If so, please provide the closing disclosure statement from your sale/purchase documentation**	☐	☐
At any time during 2025, did you receive, sell, or exchange any financial interest in any virtual currency? ***If so, please provide Form 1099 B which reports annual proceeds from broker transactions**	☐	☐
Did you Install Solar Panels on your home and/or did you purchase a Qualified Plug-In Vehicle in 2025? ***If so, please supply purchase receipts**	☐	☐
Did you pay loan interest on a qualified car, minivan, van, SUV, pick-up truck or motorcycle, with a gross vehicle weight rating of less than 14,000 pounds, and underwent final assembly in the United States? ***If so, please supply documentation showing the total amount of loan interest paid in 2025**	☐	☐
Did you or your spouse earn any income from a foreign country and/or maintain any foreign national accounts with an aggregate value exceeding $10,000 at any time during 2025?	☐	☐

Please include any additional comments or concerns in the area provided below

YOUR NAME(S): ____

Please check the boxes of all that apply to you and provide amounts

☐ **PRESCRIPTION MEDICINE EXPENSES**
Total Amount paid $________________
(Please do not include medical expense receipts)

☐ **DOCTORS, DENISTS, NURSING HOME**
Total Amount paid $________________
(Please do not include medical expense receipts)

☐ **MEDICAL INSURANCE PREMIUMS**
Amount paid $________________

☐ **LONG TERM CARE EXPENSES**
Amount paid $________________

☐ **MEDICAL MILES DRIVEN**
Amount of miles ______________

☐ **REAL ESTATE TAXES PAID**
Amount paid $________________

☐ **MORTGAGE INTEREST PAID**
Amount paid $________________

☐ **CASH & CHECK CONTRIBUTIONS**
Total Amount Paid $________________
(Please do not include donation receipts)

☐ **NON-CASH CONTRIBUTIONS**
Value of donations $___________
(Amounts over $500 require receipts)

☐ **GAMBLING LOSSES TO EXTENT OF WINNINGS**
Amount Lost $________________

☐ **TRADITIONAL/SEP IRA CONTRIBUTIONS**
Amount paid $________________

☐ **ROTH IRA CONTRIBUTIONS**
Amount paid $________________

☐ **HSA, MSA CONTRIBUTIONS- NON-EMPLOYER**
Amount paid $________________

☐ **IRS IDENTITY PROTECTION PIN #**
____

☐ **RENT EXPENSE (NJ Residents Only)**
Amount paid $_______________

☐ **MILITARY VETERAN (NJ Residents Only)**

2025 CHILDCARE PAYMENTS

(If you paid for anyone to care for your children while you work; complete this section)

Daycare Facility ____
Name of Facility *Address* ******EIN Number REQUIRED***

Summer camp or Childcare Provider ____
Name of Provider *Address* *Social Security Number*

Dependent #1 ____
Name *Amount Paid for this Child's care*

Dependent #2 ____
Name *Amount paid for this Child's care*

2025 ESTIMATED TAX PAYMENTS

(If you paid estimated tax payments throughout the year; complete this section)

Date Due	**Date Paid**	**Federal Amount Paid**	**State Amount Paid**	**PA Local Paid**
April 15, 2025				
June 16 , 2025				
September 16, 2025				
January 15, **2026**				

Privacy Policy of Blue Line Tax & Accounting Services

To Our Clients:

Your privacy is important to us, and maintaining your trust and confidence is one of our highest priorities. We respect your right to keep your personal information confidential and understand your desire to avoid unwanted solicitations. A recent law change requires us (along with banks, brokerage houses, and other financial institutions) to disclose our Privacy Policy to you – which we are more than happy to do. We hope that by taking a minute to read it, you will have a better understanding of what we do with the information you provide us and how we keep it private and secure.

A. Types of Information We Collect

We collect certain personal information about you – but only when that information is provided by you or is obtained by us with your authorization. We use that information to prepare your personal income tax returns and may also provide various tax and financial planning services to you at your request.

Examples of sources from which we collect information include:

- interviews and phone calls with you,
- letters or e-mails from you,
- tax return or income tax organizers, and
- financial history questionnaires.

B. Parties to Whom We Disclose Information

We do not disclose personal information about our clients or former clients to anyone. However, to the extent permitted by law and any applicable state Code of Professional Conduct, certain nonpublic information about you may be disclosed in the following situations:

- To comply with a validly issued and enforceable subpoena or summons.
- In the course of a review of our firm's practices under the authorization of a state or national licensing board, or as necessary to properly respond to an inquiry or complaint from such a licensing board of organization.
- As a part of any actual or threatened legal proceedings or alternative dispute resolution proceedings either initiated by or against us, provided we disclose only the information necessary to file, pursue, or defend against the lawsuit and take reasonable precautions to ensure that the information disclosed does not become a matter of public record.
- To provide information to affiliates of the firm and nonaffiliated third parties who perform services or functions for us in conjunction with our services to you, but only if we have a contractual agreement with the other party which prohibits them from disclosing or using the information other than for the purposes for which it was disclosed. (Examples of such disclosures include using an outside service bureau to process tax returns or engaging a records-retention agency to store prior year records.)

C. Security

- Physical security, electronic security safeguards and strict procedural measures that meet federal and state standards are in practice to protect your non-public personal information.

2025 TAX PREPARATION ENGAGEMENT LETTER

This letter is to confirm and specify the terms of our [my] engagement with you, and your spouse if applicable, and to clarify the nature and extent of the services we [I] will provide.

We [I] will prepare your 2025 federal income tax return, and the mutually agreed-upon income tax returns for the states and local jurisdictions, if applicable (collectively, the returns). Our [my] engagement will be complete upon the delivery of the completed returns to you. We [I] are responsible for electronically filing your Federal and state[s] returns with the appropriate taxing authorities. If applicable, you will be solely responsible to file the local jurisdiction income tax return with the appropriate taxing authority along with any payment that may be due for Pennsylvania residents.

We [I] will prepare the returns from information which you will furnish to us [me]. It is your responsibility to provide all the information required for the preparation of complete and accurate returns. We [I] will furnish you with questionnaires and/or worksheets as needed to guide you in gathering the necessary information. Your use of such forms will assist us [me] in keeping our [my] fee to a minimum. To the extent we [I] render any additional accounting and/or bookkeeping assistance, it will be limited to those tasks we [I] deem necessary for preparation of the returns. In the event the IRS issues a notice pertaining to a tax year in which Blue Line is engaged in tax preparation services, the normal hourly fee will be billed for response time if the notice was sent due to failing to originally provide the proper documentation as it relates to the notice.

The timeliness of your cooperation is essential to our [my] ability to complete this engagement. Specifically, we [I] must receive accurate information from which to prepare your returns. Accordingly, if we [I] do not receive all required information from you, as noted above, by <u>Friday, March 20th, 2026</u>, it will be mandatory for us [me] to pursue an extension of the due date of your returns and your taxes will be finalized and filed after the original due date of April 15th, 2026. You understand that an extension will only protect you from a penalty for late filing and not for late paying of any tax due for the 2025 federal returns. Additionally, NJ will not acknowledge an extension of time to file unless all possible tax due is paid with the extension. Lastly, the law provides various penalties and interest that may be imposed when taxpayers underestimate their tax liability and/or file the returns in an untimely fashion. You acknowledge that any such understated tax, and any imposed interest and penalties, are your responsibility, and that we [I] have no responsibility in that regard.

In connection with this engagement, we [I] may communicate with you or others via email and online transmissions over the internet. As emails can potentially be intercepted and read, disclosed, or otherwise used or communicated by an unintended third party, or may not be delivered to each of the parties to whom they are directed and only to such parties, we [I] cannot guarantee or warrant those emails and online transmissions from us [me] will be delivered and read only by the addressee. Therefore, we [I] specifically disclaim and waive any liability or responsibility whatsoever for interception or unintentional disclosure of emails transmitted by us [me] in connection with the performance of this engagement. In that regard, you agree that we [I] shall have no liability for any loss or damage to any person or entity resulting from the use of email and online transmissions, including any consequential, incidental, direct, indirect, or special damages, such as loss of revenues or anticipated profits, or disclosure or communication of confidential or proprietary information.

It is our [my] policy to retain engagement documentation for a period of three years, after which time we [I] will commence the process of destroying the contents of our [my] engagement files. To the extent we [I] accumulate any of your original records during the engagement, those documents will be returned to you promptly upon completion of the engagement. The balance of our [my] engagement file, other than a copy of your income tax return, which we [I] will provide to you at the conclusion of the engagement, is our [my] property, and we [I] will provide copies of such documents at our [my] discretion, unless required by law.

We [I] will not audit or otherwise verify the data you submit. Accordingly, our [my] engagement cannot be relied upon to disclose errors, fraud, or other illegal acts that may exist. However, it may be necessary to ask you for clarification of some of the information you provide, and we [I] will inform you of any material errors, fraud, or other illegal acts that come to our [my] attention.

Your returns may be selected for review by one or more than one taxing authority. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such a government tax examination, we [I] will be available upon your written approval to represent you during the examination and/or during any appeal. Any such representation will be the subject of, and governed by, a separate engagement and will be subject to [my] standard hourly rate. You are responsible for maintaining an adequate and efficient accounting system, for safeguarding your assets, for authorizing transactions, and for retaining supporting documentation for those transactions, all of which will help assure the preparation of proper tax returns. Furthermore, you are responsible for evaluating the adequacy and results of the services we [I] provide.

If, after full consideration and consultation with counsel if so desired, you agree to authorize us [me] to prepare your federal and state income tax returns pursuant to the terms set forth above, please execute this letter on the line below designated for your signature. You are encouraged to keep a copy of this fully executed letter for your records.

Thank you for your attention to this matter, and please contact me with any questions that you

may have.

Very truly yours,

Jeffrey A. Yovanovich, EA

ACCEPTED AND AGREED:

(Sign Here) ______________________________ Date: