BCSnational

Accounting ▲ Payroll ▲ Taxes

2025 Tax Questionnaire

EIC, CTC, & AOTC Credits

- To take any of these credits in 2025, you need to send us copies of your current Social Security card.

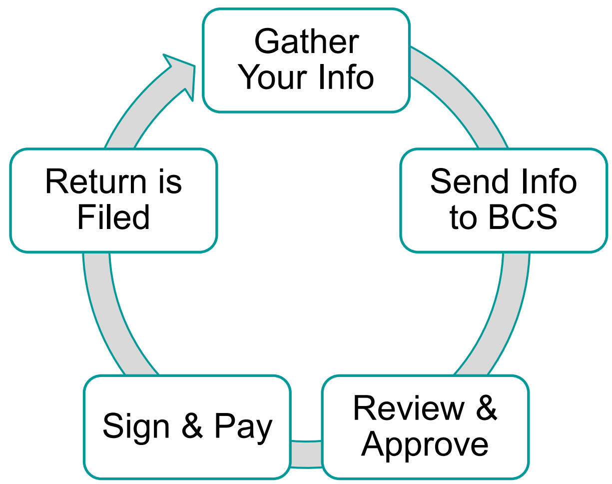
Deductible Car Loan Interest

- Loan incurred after 12/31/2024
- Original use vehicle under 14k pounds
- FInal assembly in the USA
- Need VIN Number
- Interest portion only - you should receive a document from the loan company.

Overtime & Tips Credit

- Must have letter from employer with the eligible amounts for 2025.

Understanding the BCS Workflow:



Please complete this brief tax questionnaire and return to us along with your tax forms and documents received for 2025. Feel free to call us at 480-839-1327 if you have any questions while you are putting this information together.

Please return this signed questionnaire along with your tax documents.

The tax information within this document is intended to cover most tax planning requirements, but not all of them. Additional action/information may be necessary depending on your specific situation. It is the user's/client's responsibility to consider and disclose any unusual situations when consulting with BCS National and the accuracy of return preparation is dependent upon the legitimacy of the information provided.

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This document must be signed on Page 5.

Personal Information

Legal Name (First, Middle, Last, Jr, Sr, etc.)		Date of Birth		Social Security Number	
Current Address / Same Address on License? ❑ Yes ❑ No		City	State	Zip / Postal Code	
Primary Phone #	Secondary Phone #	E-mail Address			
Occupation	State of Residence for 2025	Did you make money in a state other than your primary residence? ❑ Yes ❑ No Please List:			
Marital Status as of December 31, 2025 ❑ Single ❑ Married ❑ Divorced ❑ Legally Separated ❑ Widowed		Did you serve in the U.S. Armed Forces during 2025? ❑ Yes ❑ No Please List Branch and Any Special Situations:			
Number of Dependents	Can you be claimed as a dependent? ❑ Yes ❑ No Please Specify the Situation:	Do you support any person other than your own children? ❑ Yes ❑ No Please Specify the Situation:			

Spouse's Information

Legal Name (First, Middle, Last, Jr, Sr, etc.)		Date of Birth		Social Security Number	
Mailing Address ❑ Same as Above / Same Address on License? ❑ Yes ❑ No		City	State	Zip / Postal Code	
Primary Phone #	Secondary Phone #	E-mail Address			
Occupation	State of Residence for 2025	Did you make money in a state other than your primary residence? ❑ Yes ❑ No Please List:			
Marital Status as of December 31, 2025 ❑ Single ❑ Married ❑ Divorced ❑ Legally Separated ❑ Widowed		Did you serve in the U.S. Armed Forces during 2025? ❑ Yes ❑ No Please List Branch and Any Special Situations:			
Number of Dependents	Can you be claimed as a dependent? ❑ Yes ❑ No Please Specify the Situation:	Do you support any person other than your own children? ❑ Yes ❑ No Please Specify the Situation:			

Dependent Information *(if necessary)*

Relation	Dependent's Name (First, Middle, Last, Jr, Sr, etc.)	Birth Cert. ☐	Age	Date of Birth	Social Security #	Months Lived with You in 2025?
Relation	Dependent's Name (First, Middle, Last, Jr, Sr, etc.)	Birth Cert. ☐	Age	Date of Birth	Social Security #	Months Lived with You in 2025?
Relation	Dependent's Name (First, Middle, Last, Jr, Sr, etc.)	Birth Cert. ☐	Age	Date of Birth	Social Security #	Months Lived with You in 2025?

Please Fill Out Information for Additional Dependents in the "Information/Notes" Lines Provided Below

Any changes to your information for the 2025 Tax Year?

Did you move, change jobs, sell your house, take a distribution from your retirement fund, or expand your family?
We need to know about **ANY** changes during 2025!

Yes* **No** *If yes to any question, please provide us with any related tax forms and more details on page 5.

Personal Information

- ☐ ☐ Did your marital status change during the year?
- ☐ ☐ Did your address change during the year?

Dependents

- ☐ ☐ Could you be claimed as a dependent on another person's tax return?
- ☐ ☐ Were there any changes in dependents?
- ☐ ☐ Did any of your dependents have unearned income over $1,350 or earned income over $15,750? If yes, the dependent is required to file a return. Did any dependents have a W2 with withholding?
- ☐ ☐ Do you want us to prepare a tax return for your dependent if required?
- ☐ ☐ Did you or your spouse pay for childcare while you or your spouse worked or looked for work?

Healthcare

- ☐ ☐ Did you obtain healthcare coverage through the Marketplace? If yes, include all **Form 1095-A**.
- ☐ ☐ Did you have any transactions pertaining to a health savings account (HSA) or medical savings account (MSA)? If so, include all **Form 1099-SA and/or 5498-SA**.

Retirement

- ☐ ☐ Did you receive a distribution from or contribute to a retirement plan (401(k), IRA, etc.)? If so, include all **Forms 5498 and/or 1099-R**.
- ☐ ☐ Did you transfer or rollover any amount from one retirement plan to another?
- ☐ ☐ Did you convert all or part of your traditional/SEP/SIMPLE IRA to a Roth IRA?
- ☐ ☐ Did you withdraw any amounts from your IRA to pay for higher education expenses or acquire a principal residence? If so, provide us details.

Education

- ☐ ☐ Did you withdraw funds from a Coverdell Education Savings account or Qualified Education Program (Section 529) and use the finds for anything **other than** qualified education expenses? Include **Form 1099-Q**.
- ☐ ☐ Did you, your spouse, or a dependent incur any tuition expenses that are required to attend a college, university, or vocational school? If so, include **Form 1098-T**.
- ☐ ☐ Did you pay any student loan interest? If so, include **Form 1098-E**.

Investments

- ☐ ☐ Did you or your spouse sell any securities, investment property, or cryptocurrencies (such as Bitcoin), not reported on Form 1099-B? For cryptocurrency transactions, please include Form 8949.
- ☐ ☐ Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? If so, please include settlement statement you received at closing.
- ☐ ☐ Did you or your spouse start, purchase, or sell a business, rental property, or farm, or acquire/sell any interest in any partnership or S corporation?

Yes* No *If yes to any question, please provide us with any related tax forms and more details on page 5.

Deductions and Credits

- ☐ ☐ Did you purchase any motor vehicles, boats, or other large ticket items in 2025? If so, provide sales tax paid.
- ☐ ☐ Did you purchase a new electric vehicle prior to Sept. 30, 2025? Taking the credit or did you transfer to a dealer?
- ☐ ☐ Did you make any qualified residential energy-efficient improvements (windows and doors) or purchases involving solar, wind, geothermal, or fuel cell energy resources? If so, provide us with invoices you paid in 2025 along with the tax credit certificate received.

Miscellaneous

- ☐ ☐ Have you received any payments in 2025 using Venmo, Zelle, Paypal, eBay, or a similar company. If so, we need a 1099-K for each company/payment method that you received.
- ☐ ☐ Did you have any interest in or a signature authority over a bank account, securities account, or other financial account in a foreign country?
- ☐ ☐ Was your home rented out for more than 14 days or used as a home office? If yes, please provide details.
- ☐ ☐ Did you have total mortgages incurred on or before Dec. 15, 2017 greater than $1,000,000? Do you have total mortgages incurred after Dec. 15, 2017 greater than $750,000?
- ☐ ☐ Did you use funds from a Home Equity Line of Credit (HELOC) for anything **other than** to purchase, build, or substantially improve your residence?
- ☐ ☐ Have you been notified or audited by either the IRS or a State taxing agency? Please provide us details.
- ☐ ☐ A PDF Client Copy of your return will be emailed to you. Would you like a paper copy mailed to you in addition?

Tax Form Reference Guide

Please send us all tax forms you receive. We do not need originals, but be sure the copies are legible. These are just a few examples of the forms that you may have received:

Income Information

- ☐ Wage Statements (W-2)
- ☐ Income from Partnerships, S Corporations, Trusts, & Estates (Schedule K-1)
- ☐ Pension/Retirement Income (1099-R)
- ☐ IRA & Distributions (1099-R)
- ☐ Interest/Dividend Income (1099-INT, 1099-DIV)
- ☐ Health Insurance Forms (1095-A, B, and/or C)
- ☐ Stock & Bond Sales w/ Purchase Info (1099-B)
- ☐ Lottery/Gambling Winnings & Losses (W-2G)
- ☐ Social Security & Unemployment Income (SSA-1099, 1099-G)
- ☐ State Refund Amount (1099-G)
- ☐ Income & Expenses from Rental Properties
- ☐ Alimony Paid or Received
- ☐ Investment Year-End Composite Statements
- ☐ Form 8949 from Crypto Exchange / Trading Service
- ☐ Self-Employment Earnings (1099-MISC, 1099-NEC)
- ☐ Third Party Processing Statements (1099-K)

Expense Information

- ☐ Medical, Dental, and Insurance Expenses
- ☐ Capital Purchases for Depreciation
- ☐ Vehicle Mileage Information for Self-Employed
- ☐ Vehicle Registration Copies
- ☐ Real Estate & Personal Property Taxes
- ☐ Mortgage / Home Equity Loan Interest (1098)
- ☐ Cash & Non-Cash Charitable Donations
- ☐ Childcare Expenses & Provider Information
- ☐ Education Expenses (1098-T, 1099-Q)
- ☐ Student Loan Interest (1098-E)

Other Information

- ☐ Estimated Federal & State Taxes Paid
- ☐ Purchase or Sale of Residence
- ☐ Purchase or Sale of Investment Property

New Clients: *please provide your last 2 years' tax returns.*

Additional Information *(provide any details related to "Yes" answers from the previous pages)*

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If you are due a refund (or need to make a payment) and would like the funds to deposit/debit directly from your bank, please provide your banking information here:

Direct Deposit/Debit: ☐ Yes ☐ No

Bank Name: Routing #: Acct #:

Account Type: ☐Checking ☐Savings

Tax Preparation Engagement Details:

Thank you for choosing BCS National to assist you with your tax returns. The details below confirm the terms of our engagement with you and outlines the nature and extent of the services that BCS National will provide:

- BCS National will prepare your Federal and State income tax returns for 2025.
- BCS National will depend on you to provide the information needed to prepare accurate returns.
- Information you provide will be kept confidential and safeguarded.
- The tax return preparation fee will be based on the complexity of the return.
- Any accounting services needed in order to prepare your returns will be charged at an hourly rate of $175.
- BCS National will return your original records to you along with a copy of your tax return(s), if requested on page 4.
- You should securely store these records, along with all of your supporting documents, for seven years.
- BCS National will retain copies of your records and our work papers for seven years.
- BCS National is available to assist you at the normal hourly rate if your return is selected for audit by the IRS or State.
- BCS National will assist you with any response necessary to an IRS or State notice/letter received.

Please return this Tax Questionnaire and any other Tax Forms by March 1, 2026.

I/We have submitted this information for the sole purpose of preparing my/our tax return(s). This information is true, correct, and complete to the best of my knowledge. I/We agree to the terms of the 2025 Tax Return Engagement details above if I/we 1) sign this tax questionnaire, 2) send 2025 tax data to BCS National to use in the preparation of my/our 2025 income tax return(s), or 3) authorize BCS to electronically submit my/our tax returns to the taxing authorities.

Accepted by: *(both spouses must sign for preparation of joint returns)*

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Taxpayer Signature Name *(printed)* Date

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Spouse Signature Name *(printed)* Date

Reminders and Clarification

Any Changes- Make sure that you let us know about any changes in your life over the past year:

- *Did you move?*
- *Change jobs?*
- *Get married?*
- *Have crypto?*
- *Get divorced?*
- *Start a family?*
- *Start an IRA?*
- *Convert IRA to Roth?*

Even the smallest change can impact your taxes.

Job Related Expenses, and Miles driven to and from your job, are not deductible.

Child Care- You need to provide the name of the provider, EIN, Address, and amounts paid per child during 2025.

Additional Forms that you may need when gathering your tax information are available here and on our website:

Self-Employment Questionnaire

Rental Property Form

Donations & Contributions Form

Medical & Dental Expenses Form

Insolvency Worksheet

Our Promise

There are endless resources available to help you understand and file your 2025 taxes. We appreciate that you chose BCS as your partner this year and we will do everything in our power to make the 2025 tax season as simple and painless as possible for you. Our passion and experience will be brought to bear both for helping you find every possible deduction within the law, and for developing a strong relationship with you that we hope will last for years to come.

Call Us: 480-839-1327

Email Us: KB@bcsnational.com

Mail Us: 1825 E. Southern Ave, PMB #118
Tempe, AZ 85282
(Mailing Address)

Visit Us: **By Appointment Only,**
4635 S. Lakeshore Drive, Suite 112
Tempe, AZ 85282
(Physical Address)

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You can find more of our services online at **www.BCSnational.com**

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