

Income: Answer the following questions on the left side of this page. Check only the boxes that apply to you and/or your spouse.

Expenses and Tax Related Events: Answer the questions **Expenses and Tax Related Events:** Answer the questions

Received money from any of the following in 2025:

(B) Wages as a part-time or full-time employee

How many jobs _____

(B/A) Tips

(B/A) Retirement account, pension or annuity proceeds

(B) Disability benefits (such as payments from insurance and worker's compensation)

(B) Social Security or Railroad Retirement Benefits

(B) Unemployment benefits

(B) Refund of state or local income tax

(B) Interest or dividends (bank account, bonds, etc.)

(A) Sale of stocks, bonds or real estate

Did you report a loss on last year's return Yes No

(B) Alimony

(A/M) Income from renting out your house or a room in your house
if yes, did you use the dwelling unit as a personal residence and rent it for fewer than 15 days Yes No

Income from renting personal property such as a vehicle

(B) Gambling winnings, including lottery

(A) Payments for contract or self-employment work

Did you report a loss on last year's return Yes No

Any other money received during the year? (example: cash payments, jury duty, awards, digital assets, royalties, union strike benefits)

Paid any of the following expenses to itemize in 2025?

(A) Mortgage Interest

(A) Taxes: state, local, real estate, sales, etc.

(A) Medical, dental, prescription expenses

(A) Charitable contributions

Paid any of these expenses in 2025?

(B) Student loan interest

(B) Child and dependent care

(B/A) Contributions to a retirement account

(B) School supplies by a teacher, teacher's aide or other educator

(B) Alimony payments (do not include child support)

Did any of the following happen during 2025?

(B) You or someone in your family took educational classes (technical school, college, job related, etc.)

(A) Sell a home

(A) Have a health savings account (HSA)

(A) Purchase health insurance through the Marketplace (Exchange)

(A) Purchase and install energy-efficient home items (example: windows, furnace, insulation, etc.)

(A) Other (example: purchased a new vehicle, etc.)

(A) Have credit card, mortgage, or other debt cancelled/forgiven by a lender

(A) Have a loss related to a declared Federal disaster area

(B) Have a tax credit disallowed (example: earned income credit, child tax credit, or American opportunity credit)

Receive any letter or bill from the IRS

(B) Make estimated tax payments or apply last year's refund to 2025 taxes