

PICK-UP

PORTAL

MAIL

CONTACT INFORMATION

Name:	Spouse Name:
Address:	
Date of Birth:	Spouse Date of Birth:
Phone #:	Spouse Phone #:
Email:	Spouse Email:
Occupation:	Spouse Occupation:

BANK INFORMATION

Bank Name:

Routing #:

Account#:

Account Type: **Checking** ☐ **Savings** ☐

GENERAL INFORMATION

	Yes	No
Did your marital status or number of dependents change since last year?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have dependents who must file a tax return this year?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, do you want our office to prepare the tax returns?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have an Identity Protection Personal Identification Number (IP PIN) from the IRS?	<input type="checkbox"/>	<input type="checkbox"/>

ITEMS RELATED TO INCOME

	Yes	No
Did you or your spouse receive any unemployment payments in 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive income from tips in 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive income from overtime pay in 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Did you buy, sell, refinance, or abandon a principal residence or other real estate in 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any interest or dividend income in 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any brokerage accounts with capital gain or loss activity?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any cancellation of debt and received a Form 1099-C in 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay a mortgage?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay real estate taxes?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have business income reported on Schedule C in 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Did you have any rental property in 2025?	<input type="checkbox"/>	<input type="checkbox"/>

RETIREMENT, IRA AND PENSION

	Yes	No
Did you take distributions from an IRA, 401(k), pension or profit-sharing plan?	<input type="checkbox"/>	<input type="checkbox"/>
Did you or your spouse receive Social Security Retirement benefits in 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make any IRA contributions?	<input type="checkbox"/>	<input type="checkbox"/>

COLLEGE INFORMATION

	Yes	No
Did you pay college tuition in 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Did you pay student loan interest for you, your spouse or dependents?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make contributions to a New York State 529 college savings plan?	<input type="checkbox"/>	<input type="checkbox"/>
Did you take any distributions from a 529 college savings plan?	<input type="checkbox"/>	<input type="checkbox"/>

HEALTH INSURANCE

	Yes	No
Did you have health insurance through the New York State marketplace?	<input type="checkbox"/>	<input type="checkbox"/>
Did you contribute to OR receive distributions from a Health Savings Account (HSA)?	<input type="checkbox"/>	<input type="checkbox"/>

MISCELLANEOUS

	Yes	No
Did you install energy efficient windows, doors, A/C, hot water heater or boiler during 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Did you incur any child care expenses in 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have any gambling winnings to report for 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Did you cash in any U.S. Savings Bonds?	<input type="checkbox"/>	<input type="checkbox"/>
Did you engage in any virtual currency OR digital asset transactions during 2025?	<input type="checkbox"/>	<input type="checkbox"/>
Are you or your spouse a teacher?	<input type="checkbox"/>	<input type="checkbox"/>
Are you or your spouse a volunteer firefighter?	<input type="checkbox"/>	<input type="checkbox"/>
Did you make all suggested estimated payments?	<input type="checkbox"/>	<input type="checkbox"/>
Did you receive an inflation refund check from New York State?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like to schedule a free appointment for after tax season with Kuttin Wealth Management to review your financial portfolio?	<input type="checkbox"/>	<input type="checkbox"/>

Client Signature:

Date:

Notes: