



**BARMAR, Inc.**  
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 Lincoln, NE 68502

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## 2025 CLIENT QUESTIONNAIRE

**NAME:** \_\_\_\_\_ **PHONE #:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**EMAIL ADDRESS:** \_\_\_\_\_

As of September 30, 2025, the IRS will not be issuing refunds in the form of a check, only direct deposit. Burr Business Service requires that we facilitate your balances due and have your refunds directly deposited.

Please circle **YES** or **NO** to each of the following questions:

|  |     |    |
|--|-----|----|
| Did you receive, sell, send, or exchange any digital assets in any virtual currency? (Bitcoin/Crypto)            | Yes | No |
| Do you have an LLC / Corporation / Partnership? Active or inactive?  | Yes | No |
| Did you make a IRA contribution that was never deducted? (ask what to do regarding this)                         | Yes | No |
| Did you do charity giving? If so please provide dollar amount even if you do not itemize                         | Yes | No |
| Did you receive paid tips or paid overtime (if yes we need paystubs)   | Yes | No |
| Did you live, work, own real estate in a foreign country; receive benefits, gifts or money from foreign sources? | Yes | No |
| Did you have any interest in a partnership; start or dispose of a business this year?                            | Yes | No |
| Did you receive a 1099-K (from PayPal/google/internet, cash aps) or 1099-Misc (prizes/awards) or 1099-NEC?       | Yes | No |
| Did you receive any K-1's, K-2's or K-3's  | Yes | No |
| Did you pay tuition or put money into a Nebraska college or ABLE savings plan?                                   | Yes | No |
| Did you have a Health Savings Account? / a Marketplace Plan 1095A?   | Yes | No |
| Did you withdraw from a mutual fund or sell a stock?   | Yes | No |
| Did you contribute, convert, or withdraw a pension plan or IRA (Roth/Traditional)?                               | Yes | No |
| Did you receive any correspondence from the IRS or NE Dept. of Rev?  | Yes | No |
| Did you make estimated tax payments?   | Yes | No |
| Do you plan to apply for Social Security in 2026?  | Yes | No |
| Did you transfer a home from a parent to a child or other person?  | Yes | No |
| Did you give a gift of more than \$19,000 to one or more people?   | Yes | No |
| Can you be claimed as a dependent by another taxpayer?   | Yes | No |
| Were there any Births, Deaths, Divorces, Marriages, or Adoptions in 2025?  | Yes | No |
| Did you provide a home for or help support another person? Any disabled children under 21?                       | Yes | No |
| Did you replace windows, furnace, air conditioner, water heater, or solar panels? (2025 is last year to claim)   | Yes | No |

**\*Please use SmartVault to view and download information. If you need an invite, let us know. \***

**CIRCLE** any items that pertain to you or your spouse:

Alimony, Scholarships, Grants, Savings Bonds, Jury Duty, Unemployment Compensation, Prizes, Bonuses, Awards, Gambling Winnings, Commissions, Worker's Compensation, Disability, Veteran's Pension, Installment Sale Payments, State Tax Refund, **income from another state**, rental property, sell or purchase a home, refinance any loan, bankruptcy, cancel debt, identity theft, barter, Airbnb, online sales, or any other income?

**\*\*\*\*\* Fill out below only if you are filing Head of Household: \*\*\*\*\***

|   |     |    |
|---|-----|----|
| Were you single or legally separated for the last half of the year? (Need copy of separation agreement or divorce decree) | Yes | No |
| Did a qualifying child or dependent live with you for at least half of the year?  | Yes | No |
| Did you provide more than 1/2 the costs of maintaining a home for you and dependent?                                      | Yes | No |