

2026 TAX APPOINTMENT & QUESTIONNAIRE (for 2025 Taxes)

Dear client,

Your tax appointment for this year is:

Day _____ Date _____ Time _____ am/pm

This document digitally available at
mckaytax.com (tools & checklists)



My Office _____ Mail _____ Portal _____ Drop Off _____ Car _____

If you are unable to keep this appointment date kindly give us as much advance notice as possible so that your time can be filled by someone else.

OPTIONS FOR SHARING YOUR TAX INFORMATION WITH US IN ORDER TO COMPLETE YOUR TAX RETURN

- Use our secure portal to upload your fillable questionnaire and tax documents to complete your taxes remotely. \$10 discount with completed questionnaire. Please contact us before your appointment date if you choose this option.
- Mail your information to me and I can complete your taxes and mail back to you
- After arriving at your scheduled appointment time call us and we will immediately secure your information and complete your taxes in our office with phone call(s) while you wait in your vehicle.
- Meet with us for your appointment if in our office.

HOW TO ENSURE THAT YOU ARE GETTING THE MAXIMUM POSSIBLE DEDUCTIONS & CREDITS ALLOWED BY LAW:

- Please read and complete the "Information Checklist" (right) and all other parts of the questionnaire that apply before the appointment date.
- Bring a list of all other tax questions to the appointment.

TO OPT OUT OF RECEIVING TEXT MESSAGES PLEASE CONTACT US TAX PREPARATION FEES:

- Minimum fees for Federal are \$129 or \$119 if filing through the portal (only with a completed questionnaire). The average fee is usually between \$150 and \$200 but can vary by the number of extra forms and their complexity. See the complete list of form prices at www.mckaytax.com. \$40 referral fee for referring a friend.
- You may pay with cash, check, Visa, Master Card, Venmo, or from your refund

If you have any questions or need to change your appointment, please call (801) 695-4690. If I am not in the office then please leave a message and I will return your call promptly. Thanks for your business.

Richard V McKay E.A

Rebecka P McKay

NEW OFFICE ADDRESS & PHONE

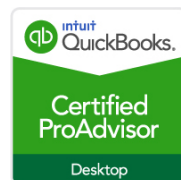
McKay Tax and Accounting

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Roy, UT 84067

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www.Mckaytax.com

RV Software Inc.

Please have the following available for our appointment;

- Last years tax return (Only if done by someone else)
- All W-2's, 1099's, k-1's, 1098's
- Records of all other incomes and expenses
- Escrow statements of any property bought, sold or financed
- Health Insurance Form 1095-A if applicable
- State ID (Drivers License)

YES	NO	Unsure	INFORMATION CHECKLIST	
			Did you have any other sources of income other than from the W2s, 1099s, K1s, and other income information that you have presented ?	
			At any time during 2025, did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency?	
			Has your marital status, address, or dependents changed from last year?	
			Did you support anyone other than your own children or does anyone live with you who is not your dependent?	
			Do you have any losses to carry forward from previous years?	
			Did you sell any securities or has any become worthless during 2025?	
			Did you pay interest on a mobile home, motor home, or boat that has basic living accommodations?	
			Did you buy, sell, or refinance real estate? Bring Hud statements.	
			Did you pay for medical insurance that is not subsidized by an employer?	
			If you have a small business do you use a portion of your home as an office for business purposes on an ongoing and exclusive basis?	
			Did you receive tips as a worker in the service industry or did you receive overtime pay in 2025?	
			Did you pay higher education expenses for you or your dependent this year? (Tuition, Fees, Books, and interest). List names and amounts on page two, section 6 under "Education Credits". Bring form 1098-T	
			Does anyone owe you money which has become a bad debt? (There must be true debtor/creditor relationship)	
			Last year did you or your spouse purchase health insurance from the Marketplace (Obamacare) to help you reduce your monthly health insurance costs? Bring Form 1095-A	
			Did you pay interest on a new vehicle assembled in USA? Used or business vehicles excluded	
			Did you receive alimony?	Amount
			Did you pay alimony	SS #
				Amount
			Do you have a health savings account? Bring Form 1099-SA	
			In 2025 did you have interest in a foreign account ?	
			Do you use a home equity loan to buy or improve your home? If so please provide principal balances during the year.	
If you contribute to a retirement plan that was not a deduction from you wages then enter below. Information for retirement plans deducted from your wages are accounted for in your W2. Do not list 401(k)				
			Did you contribute to a Regular IRA ?	Amount
			Did you contribute to a Roth IRA ?	Amount

INCOME 2025

Section 1: PERSONAL INFORMATION

CHECK IF NO PERSONAL CHANGES FROM LAST YR & WE DID YOUR TAXES

If there are no changes it is not necessary to fill in personal data section EXCEPT DEPENDENTS INCOME & AGE.

Full Names(both)				
Address				
Home Phone		Work Phone		email
	Soc. Sec. Number	Occupation	Cell Phone	Date of Birth
You				
Spouse				

Section 2: DRIVERS LICENSE

	License num	State	Issue date	Expiration Date
You				
Spouse				

Section 3: DEPENDENTS

PLEASE LIST ALL BIRTH DATES & INCOME

Full Name	Relation-Ship	Date of Birth	Income	Social Security Number	Months lived in home 2025

TOTAL HOUSEHOLD RESIDENTS IN 2025

Section 4: ALL INTEREST AND DIVIDENDS RECEIVED

Interest Source	Amount	Dividend Source	QU	Amount

Section 5: SALE OF STOCKS / SECURITIES

Description	Date Acquired	Date Sold	Cost/ Basis	Selling Price

Section 6: OTHER INCOME

State tax refunds received in 2025	Tips received-(unreported only)
Unemployment compensation - bring statements	Hobby income
Social Security/RR Tier 1 - bring statements	Other income(prize,award,gambling) bring info

DEDUCTIONS 2025

Section 7: MEDICAL EXPENSES

Prescription drugs				
Health insurance premiums /Medicare				
Doctors/Dentists				
Hospitals / Emergency Care/X-ray/Lab				
Medical equipment				
Glasses / Contacts /Hearing Aids				
Medical Miles (21¢)				
Reimbursements for amounts above		Cafeteria Plan Payments		

Section 8: TAXES (Utah car fees not deductible)

State Tax Paid with 2024 taxes in 2025	Real Estate Residence
Sales Tax on Auto,Truck, Boat, Motorcycle	Real Estate Tax Land
Auto/Truck county tax (NOT valid in Utah)	Other Real Estate

Section 9: INTEREST PAID

Mortgage Interest (1st, or 2nd to improve HM)	Investment Int
Mortgage Interest (1st, or 2nd to improve HM)	Note: Interest only for buying or improving home
Mortgage Insurance (1st/2nd to improve HM)	

Section 10: CONTRIBUTIONS

Donee	Amount:	Donee	Amount
Donee	Amount:	Donee	Amount
Donee	Amount:	Donee	Amount
Charitable Miles (14¢)			
Donated Property Description			
Cost			
Fair Market Value			

Section 11: EDUCATION CREDITS (must have form 1098-T)

Student Name	College year fresh,soph,Jr,Sr	Tuition/ Fees/ books	Loan Interest

Section 12: CHILD CARE EXPENSES

Child/Dependent Care Expenses(under 13) or Physically Handicapped

Care Provider	Address	S.S.#/E.I.#	Amt. Paid

Employer Provided Child Care Payments (Cafeteria Plan)

Section 13: ESTIMATED TAXES PAID

1st Quarter Date	1st Quarter Amount
2nd Quarter Date	2nd Quarter Amount
3rd Quarter Date	3rd Quarter Amount
4th Quarter Date	4th Quarter Amount

BUSINESS INCOME and EXPENSES 2025

Section 14: SELF EMPLOYED INCOME/EXPENSES

Product or Service			
Did you actively participate in the business this year	YES		NO
Did you file a Schedule C for this business before	YES		NO
Gross Income	Returns		
Beginning Inventory		Purchases	
Personal Use Items		Ending Inventory	
Advertising		Rent(other)	
Bad Debts		Repairs/Maint.	
Bank Charges		Supplies	
Commissions/fees		Taxes/License	
Cleaning		Travel	
Depletion		Meals	
Dues/Publications		Medical Ins.	
Employee Benefits		Utilities	
Insurance		Wages	
Business Interest		Job Credit	
Interest(mortgage)		Other:	
Legal/Professional		Other:	
Profit Sharing		Other:	
Rent(equip/veh)		Other:	

Section 15: VEHICLE EXPENSES-EMPLOYEE or SELF EMPLOYED

	Veh 1 Desc:		Veh 2 Desc:	
Date placed in service				
Total mileage for year				
Business miles for year				
Distance from home to work				
Cost/Fair Market Value on date place in service				
Do you have another personal vehicle(Y/N)	YES		NO	
Do you have written evidence of business miles(Y/N)	YES		NO	

Section 16: VEHICLE ACTUAL EXPENSES (Not required for mileage rate)

	Vehicle 1 Desc:		Vehicle 2 Desc:	
Gas/Oil/Repairs/Wash				
Tires/Batteries etc..				
Insurance/License				
Taxes				
Interest				
Lease Payments				
Other:				

Section 18: OFFICE IN THE HOME SELF EMPLOYED

Office Square Ft		Home Square Ft		
Home Interest		Home taxes		Heating
Electricity		Insurance		Rent
Office Repairs		Office Maint.		Other

Section 17: RENTAL INCOME/EXPENSES

Property	Address		
A			
B			
C			
Did you or a member of your family use any of these properties for personal purposes for the greater of fourteen(14) days or 10% of the total days rented at a fair rental value?		YES	NO
Did you actively participate in the operation of these activities this yr.		YES	NO
Properties	A	B	C
Income			
Advertising			
Auto/travel			
Cleaning/Maintenance			
Commissions			
Insurance			
Legal/Professional			
Mortgage Interest			
Other Interest			
Repairs			
Supplies			
Taxes			
Electricity			
Heat			
Water/Garbage			
Phone			
Yard Care			
Other:			

Income from Partnerships/S Corp/Estates/Trusts: Attach K-1's

Section 18: TRANSACTIONS NOT REPORTED ON FORM 1099

Description	Date Acquired	Date Sold	Receipts	Cost

Section 19: SECURITIES AND PROPERTY SOLD

Description	Date Acquired	Date Sold	Receipts	Cost

Section 20: ASSETS PURCHASED for BUSINESS/RENTAL

Description(and which business)	Date Purchased	Cost