

Questions regarding inherited real estate:

Is the property going solely to you?

Does the property produce income? (ie, is it a rental property?)

Do you plan on selling the property?

Questions on sale of primary residence:

Did you ever use any part of your home as rental property?

Did profit on the sale of your primary residence exceed \$250,000 if you are a single filer or \$500,000 if you are married filing jointly?

Information needed for purchase and sale of rental property or business assets:

Selling price

Date sold

Date purchased and purchase price (in theory I should have this date because the property should already be listed as an asset for tax purposes)

Did you exchange the property for similar property (a “like kind exchange”)?

Questions regarding changes in employment:

When did you start your new job?

Is it a second job or in place of a previous job?

Is your pay changing significantly or staying about the same?

Are you now earning self-employment income? If so is it full or part time?

Questions for retirees:

What date did you officially retire?

What will be your source(s) of income and how much do you expect from each if there is more than one income source?

Do you plan to work a part-time job or start a business?

Cannot claim this deduction on business vehicles

Part IV - No Tax on Car Loan Interest

22 Applicable passenger vehicle

[Vehicle plant of origin lookup](#)

Vehicle has to be a new passenger vehicle for personal use.

Vehicle must have had its final assembly in the United States.

Vehicle must have a gross vehicle weight rating (GVWR) under 14,000 lbs.

Vehicle must be purchased with a loan (not a lease).

Loan must originate after December 31, 2024.

Vehicle will be expected to be used for more than 50% personal use (including commuting) when the loan is originated

	Vehicle 1	Vehicle 2	Vehicle 3	Vehicle 4
TS.....	v	v	v	v
Loan origination date.....				
Outstanding principal.....				
Year.....				
Make.....				
Model.....				
Vehicle identification number (VIN).....				
Business interest.....				
Personal interest.....				

Section A - Qualified Energy Efficient Improvements

17a Were the qualified energy efficiency improvements installed in or on the taxpayer's main home located in the U.S.? ☐ Yes ☐ No

b Is the taxpayer the original user of the qualified energy efficiency improvements? ☐ Yes ☐ No

c Are the components reasonably expected to remain in use for at least five years? ☐ Yes ☐ No

d Address of main home..... =

City, state, and ZIP code..... = = =

e Were improvements or costs related to the construction of this main home? ☐ Yes ☐ No

18a Cost of insulation or air sealing material or system.....

19a Cost of the most expensive exterior door bought.....

b Qualified Manufacturer Identification Number (QMID).....

c Enter the Qualified Manufacturer Identification Number(s) and cost(s) of the next two most expensive door(s)

QMID.....		Cost.....	
QMID.....		Cost.....	

e Cost of all other qualifying exterior doors.....

20a Enter the Qualified Manufacturer Identification Number(s) and cost(s) of the four most expensive window(s)/skylight(s)

QMID.....		Cost.....	
QMID.....		Cost.....	
QMID.....		Cost.....	
QMID.....		Cost.....	

b Cost of all other exterior windows and skylights.....

If the taxpayer and spouse are filing jointly and have different main homes with qualifying costs, create a second screen 5695, and complete lines 17a through 29c only. Use the "TSJ" drop list to designate one screen to the taxpayer and the other to the spouse.

MA - Schedule SC - Septic Credit

Principal with a failed system.

TSJ

Address.....=

City, State, ZIP.....=

Part I - General Information:

1a Date certificate of compliance or validation was issued.....

1b Name of approving authority.....

2 List names, addresses, and ownership percentages of any co-owners.....

2 Enter percentage of expenses you paid (default is 100%).....=

3 Home owner septic repair program

Lender.....

Amount.....

Term.....

Rate.....

Municipality sponsored

Lender.....

Amount.....

Term.....

Rate.....

Part II - Computation of Credit:

Brief Description of Costs

Date Paid

Amount

4a

5b Amounts of grants or reimbursements received from amounts in line 5a..... 5b

Form 5695 - Residential Energy Credits, continued

Part II - Energy Efficient Home Improvement Credit

Section B - Residential Energy Property Expenditures

21a Did the taxpayer incur costs for qualified energy property installed on or in connection with a U.S. home? ☒ Yes ☐ No

b Was the qualified energy property originally placed into service by the taxpayer? ☐ Yes ☐ No

c Address of each home where the taxpayer installed qualified energy property:

Street	Unit	City	State	ZIP Code
=	=	=	=	=

22a Qualified Manufacturer Identification Number (Q MID) and cost of the most expensive central air conditioner

Q MID..... Cost.....

b Cost of all other central air conditioners.....

23a Qualified Manufacturer Identification Number(s) and cost(s) of the two most expensive natural gas, propane, or oil water heaters

Q MID..... Cost.....

Q MID..... Cost.....

b Cost of all other natural gas, propane, or oil water heaters.....

24a Qualified Manufacturer Identification Number and cost of the most expensive natural gas, propane, or oil furnace or hot water boilers

Q MID..... Cost.....

b Cost of all other natural gas, propane, or oil furnace or hot water boilers.....

25a Did you install improvements or replacements of panelboards, subpanelboards, branch circuits, or feeders to enable the installation and use of a separate qualified energy efficient improvement or qualified energy property, and were both the enabling property and the enabled property installed in 2025? ☐ Yes ☐ No

b Enter the code for the type of enabled property.....

c Cost of improvements or replacement of enabling property.....

d Qualified Manufacturer Identification Number(s) of the property Q MID..... Q MID.....

26a Did the taxpayer incur costs for a home energy audit that included an inspection of their main home located in the U.S. and a written report prepared by a certified home energy auditor? ☐ Yes ☐ No

b Cost of home energy audits.....

29a Qualified Manufacturer Identification Number and cost of the most expensive electric or natural gas heat pumps

Q MID..... Cost.....

b Cost of all other electric or natural gas heat pumps.....

c Qualified Manufacturer Identification Number and cost of the most expensive electric or natural gas heat pump water heaters

Q MID..... Cost.....

d Cost of all other electric or natural gas heat pump water heaters.....

e Qualified Manufacturer Identification Number and cost of the most expensive biomass stoves and boilers

Q MID..... Cost.....

f Cost of all other biomass stoves and boilers.....

32a ☐ Joint occupant applies [Joint Occupant Statement](#)

32b ☐ You are reporting a condo or cooperative fractional share