

# 2025 CLIENT INFORMATION SHEET

**WE ONLY ACCEPT CASH OR CHECK**

**TAXPAYER:** USE FULL LEGAL NAME

FIRST NAME: \_\_\_\_\_ MI: \_\_\_\_

LAST NAME: \_\_\_\_\_

SSN: \_\_\_\_\_

OCCUPATION: \_\_\_\_\_

D.O.B.: \_\_\_\_/\_\_\_\_/\_\_\_\_

PHONE NUMBER: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_ ZIP: \_\_\_\_\_

COUNTY OF RESIDENCE: \_\_\_\_\_

**SPOUSE:** USE FULL LEGAL NAME

FIRST NAME: \_\_\_\_\_ MI: \_\_\_\_

LAST NAME: \_\_\_\_\_

SSN: \_\_\_\_\_

OCCUPATION: \_\_\_\_\_

D.O.B.: \_\_\_\_/\_\_\_\_/\_\_\_\_

PHONE NUMBER: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_ ZIP: \_\_\_\_\_

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

**PREFERRED PHONE NUMBER:** \_\_\_\_\_

DID YOU GET YOUR TAXES DONE HERE LAST YEAR?	YES	NO
HOW WOULD YOU PREFER TO BE CONTACTED? PLEASE CIRCLE ALL THAT APPLY.	EMAIL	TEXT CALL
MARITAL STATUS AT THE END OF THE YEAR. IF YOU ARE MARRIED AND REQUESTING FILING SEPARATE, PLEASE EXPLAIN ON PAGE 3.	SINGLE	MARRIED
ARE YOU CLAIMED ON ANOTHER PERSON'S RETURN? SUCH AS A PARENT.	YES	NO
DID YOU WORK OVERTIME IN 2025? IF YES, WE WILL NEED YOUR LAST PAY STUB OF 2025 OR AN EMPLOYER PROVIDED STATEMENT ALLOCATING OVERTIME AMOUNTS.	YES	NO
DO YOU HAVE QUALIFIED TIPS TO REPORT THAT ARE NOT REPORTED ON YOUR W-2? IF SO, YOU MUST NOTIFY OUR OFFICE OF THESE AMOUNTS.	YES	NO
WOULD YOU LIKE A PAPER COPY OR AN DIGIT COPY THAT YOU CAN ACCESS ANY TIME? DIGITAL COPIES ARE UPLOADED TO AN ACCOUNT INITIATED BY OUR OFFICE VIA EMAIL.	PAPER	DIGITAL
DID YOU OR YOUR SPOUSE HAVE MARKETPLACE INSURANCE? <b><u>WE MUST HAVE THE 1095-A FORM</u></b> (EX: CARESOURCE, ANTHEM BLUE CROSS BLUE SHIELD, ETC)	YES	NO
DIGITAL CURRENCY: AT ANY TIME DID YOU: (A)RECEIVE (AS AN AWARD, AWARD OR PAYMENT FOR PROPERTY OR SERVICES) OR (B) SELL *EXCHANGE, GIFT OR OTHER WISE DISPOSE OF A DIGITAL ASSET?	YES	NO
DID YOU MOVE IN 2025? IF YES, FILL OUT ALL DETAILS ON PAGE 3.	YES	NO
PLEASE CIRCLE ALL OF THE FOLLOWING SOURCES OF INCOME: <b><u>IF YOU HAVE ANY OF THE FOLLOWING</u></b> YOU WILL NEED TO PROVIDE A PROFIT & LOSS, BUSINESS INCOME & EXPENSE SHEET, ETC. <b><u>WE WILL NOT ACCEPT RECEIPTS.</u></b>	BUSINESS	FARM RENTALS S-CORP PARTNERSHIP
DID YOU MAKE ANY <u>ESTIMATED PAYMENTS</u> TO THE IRS, STATE, SCHOOL, OR CITY? IF YES, EXPLAIN IN DETAIL ON PAGE 3.	YES	NO
DID YOU, YOUR SPOUE OR ANY OF YOUR CHILDREN/DEPENDANTS ATTEND COLLEGE? IF YES WE WILL NEED <b><u>FORM 1098-T</u></b> FROM THE INSTITUTE, ALONG WITH ANY OUT-OF-POCKET EXPENSES NOT COVERED BY TUITION OR SCHOLARSHIPS.	YES	NO

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DID YOU PROVIDE A COPY OF YOUR DRIVER LICENSE OR STATE ID? WE NEED TAXPAYER & SPOUSE DRIVER LICENSE OR STATE ID	YES	NO
DO YOU HAVE ANY CHILDCARE OR QUALIFIED DEPENDENT EXPENSES? WE MUST HAVE TUITION TO PRIVATE SCHOOL, DAYCARE, BABYSITTER INFORMATION FOR WHOM IT IS PAID, EXPLAIN ON PAGE 3.	YES	NO
IF YOU OWE TAX LIABILITY TO IRS, WOULD YOU LIKE FOR THIS PAYMENT TO AUTOMATICALLY BE WITHDRAWN FROM YOUR BANK ACCOUNT? IF YES, THE PREPARER WILL CONTACT YOU FOR ADDITIONAL INFORMATION	YES	NO

**\*\*ONLY LIST THE DEPENDANTS YOU ARE CLAIMING FOR 2025. YOU MUST LIST ALL DEPENDANTS THAT YOU ARE CLAIMING IF THERE IS A CUSTODY AGREEMENT, WE WILL NEED A COPY**

FIRST & LAST NAME	SS #	D.O.B.	DID CHILD LIVE WITH YOU ALL 12 MONTHS		COLLEGE STUDENT	
			YES	NO	YES	NO

IF CHILD OR DEPENDANT DID NOT LIVE WITH YOU ALL 12 MONTHS, PLEASE SPECIFY NUMBER OF DAYS & MONTHS LIVED WITH YOU.

IF YOU RECEIVE A REFUND, WOULD YOU PREFER:    **CHECK**                      **DIRECT DEPOSIT**

**BANKING INFORMATION NEEDED FOR DIRECT DEPOSIT OR ELECTRONIC PAYMENTS**

<b>NAME OF BANK:</b>	<b>CHECKING</b>	<b>SAVINGS</b>
<b>ROUTING #</b>	<b>ACCOUNTING #</b>	

PLEASE LIST ANY ADDITIONAL QUESTIONS OR CONCERNS THE PREPARER MAY NEED TO KNOW IN REGARD TO YOUR RETURN:

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**\*\*\*\*THIS FORM MUST BE ACCURATELY COMPLETED TO PREVENT ERRORS AND ADDITIONAL BILLING!\*\*\*\***

**PRINT YOUR NAME(REQUIRED):** \_\_\_\_\_

**SIGNATURE (REQUIRED):** \_\_\_\_\_ **DATE:** \_\_\_\_\_

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REASON FOR MARRIED FILING SEPARATE: \_\_\_\_\_

**MOVING INFORMATION:** WE MUST KNOW IF YOU MOVED DURING THE YEAR. AN HAVE AN ALLOCATION FOR WHAT MONEY WAS EARNED AT EACH PARTICULAR RESIDENCE.

DATES LIVED AT	ADDRESS	PLACE(S) OF EMPLOYMENT

**ESTIMATED PAYMENTS:**

	1 <sup>ST</sup> QUARTER	2 <sup>ND</sup> QUARTER	3 <sup>RD</sup> QUARTER	4 <sup>TH</sup> QUARTER
FEDERAL	\$	\$	\$	\$
STATE	\$	\$	\$	\$
SCHOOL	\$	\$	\$	\$
CITY	\$	\$	\$	\$

**CHILDCARE INFORMATION:**

SCHOOL/DAYCARE PROVIDER	ADDRESS	EIN/SSN	AMOUNT PD
			\$
			\$

ANY OTHER INFORMATION THAT NEEDS SHARED WITH OUR OFFICE:

\_\_\_\_\_  
\_\_\_\_\_

PRINT NAME: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_