



NEW CLIENT INFORMATION SHEET

Today's Date:

Personal Information

(Please use **FULL LEGAL NAME**)

Last Name	First Name	D.O.B	SSN
Address	City & State	Zip Code	
Phone Number	Email	Occupation	
Iowa Residents - School District You Reside In:			
Illinois Residents - Parcel ID and County You Reside In:			
Signature: <i>By signing your name, you hereby certify that all information provided on this document is true and accurate to the best of your knowledge.</i>			

Spouse Information

(Please use **FULL LEGAL NAME**)

Last Name	First Name	D.O.B	SSN
Address	City & State	Zip Code	
Phone Number	Email	Occupation	

Marital Status (Circle One)

Single	Married Filing Joint	Married Filing Separate	Head of Household	Surviving Spouse
If filing <i>Married Filing Separately</i> , spouse's adjusted gross income is required:				
If filing as <i>Surviving Spouse (must have dependents)</i> , please enter spouse's date of death :				

Did you have a Business Return in the prior year? (Small Business, Farm, Rental or Other) Yes/No
 If yes - We will need copy of Depreciation Schedule and last 3 years of Federal & State Tax Returns

Do you have any dependents? Yes/No
 If yes - Please fill out the dependent information on the next page.
 We will also need to make copies of any birth certificates/Social Security cards

Checklist

- Copy of last year's tax return (Last 3 years for business returns)
- Copy of driver's license
- Copy of birth certificates for **all** dependants
- Copy of Social Security cards for **all** dependants



DEPENDENT INFORMATION

Last Name	First Name	D.O.B
Relationship	Social Security #	Months Lived w/ You
Full Time Student? Yes or No	Disabled: Yes or No	Dependent's Gross Income:

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Relationship	Social Security #	Months Lived w/ You
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Last Name	First Name	D.O.B
Relationship	Social Security #	Months Lived w/ You
Full Time Student? Yes or No	Disabled: Yes or No	Dependent's Gross Income:

******THIS FORM NEEDS TO BE COMPLETED AND RETURNED WITH TAX DOCUMENTS******

(OR THIS FORM CAN BE COMPLETED AND DIGITALLY SUBMITTED ON OUR WEBSITE)

Are you claiming any dependents in 2025? - IF YES ADDITIONAL SHEET REQUIRED	YES	NO
Did you or spouse receive any unemployment income? If yes, 1099G Required	Yes	No
Did you receive retirement or Social Security benefits? If yes form SSA-1099/1099-R Required	Yes	No
Do you have Medicare? (Social Security health insurance)	Yes	No
Do you have a health insurance you pay out of pocket?(secondary/supplement) Annual Amount _____	Yes	No
Do you have Long Term Health Care policy? (Nursing Home Insurance) Name(s) _____ Cost(per individual) _____	Yes	No
Did you purchase insurance through HealthCare.gov- Market Place ? 1095-A Required	Yes	No
Have you received any of the following 1099's: (Forms Required) 1099-R - For distributions from Retirement accounts / including Roll Overs 1099-DIV - From Stock held 1099-INT - Interest Income from Banks, Stocks, ETC	Yes	No
QCD - Did you contribute to a Qualified Charitable Distribution - For those over age 70 (forms Required)	YES	NO
Have you filed any of the following in the previous tax year: (Please circle all that apply) Schedule C (Sole Prop or Single Member LLC Business) Schedule E (Rental) Schedule F (Farm)	Yes	No
Did you use a credit card processor/Venmo/PayPal/Zelle or other Payment Apps for business? If yes, 1099-K form required	Yes	No
Did you have any gambling winnings/losses? (If yes W2G's document required)	Yes	No
Did you have any Electronic/Virtual Digital Currency transactions? (Need documentation)	Yes	No
Did you sell any stocks, bonds, mutual funds or other assets? Tax Form 1099B form Required	Yes	No
Did you make any contributions (outside of payroll) to any IRA in 2025? (Documents required)	Yes	No
Educators - Do you qualify for educator expense? (300 Fed- 500 Iowa) Amount claiming _____	Yes	No
Did you make any cash donations? Amount _____	Yes	No
Did you make any NON Cash donations? Value _____ (GoodWill, Salvation Army,Referral Center, etc)	Yes	No

Did you take early withdrawal or distributions from 401K and or Roll over a 401K — 1099-R Required	Yes	No
Do you have Mortgage Interest? 1098-INT Form Required	Yes	No
Do you have Real estate/Property Tax to deduct? Will need to provide documentation OR dollar amount \$ _____ If you live in ILLINOIS and pay property tax we will need your property ID #	Yes	No
Did you purchase any Residential Energy property? Will need proof of Energy Star Certification & Receipt. (Doors, windows, furnace, water heater, etc...)	Yes	No
Did you pay for daycare/child care expense? (Will need Name, SS/EIN, Address of provider & Amount) Need amount paid for each child Attach documents with tax papers	Yes	No
Were any of your dependents, you or your spouse in college in 2025?	Yes	No
Did you pay college tuition/expenses for yourself or dependent in 2025? 1098-T Required & Receipts	Yes	No
Have you taken American Opportunity or Lifetime Learning Education Credit on previous tax returns? (Need years taken-per student claiming College Deduction in 2025)	Yes	No
Did you contribute/withdraw money from an educational IRA or 529 plan? Will need contribution letter/ 1098-Q Form Required	Yes	No
Did you pay interest on college loans? 1098-E form Required to report interest deduction	Yes	No
Did you have any debt cancelled/forgiven (credit card, etc.) or a mortgage principle reduction? 1099-C Form Required	Yes	No
Did you pay Registration fees/tuition for your dependents, grades K-12? Need amount paid for each student Attach documentation with tax papers	Yes	No
Did you contribute money to HSA account (Health Savings Account)? 5498-SA and/or 1099-SA Forms Required	Yes	No
Did you sell your primary home in 2025? How long did you live there? _____ Need a copy of the closing statement for sale of home and for NEW home you purchased.	Yes	No
Did you sell a second home or vacation home in 2025? Need a copy of the closing statement	Yes	No
Have you moved to a different school district in 2025? - Need new school district(Iowa residents only)	Yes	No
Have you moved to a different state during 2025? –Need specific dates of residency Date moved OUT OF old state _____ Date moved INTO new state _____	Yes	No
Are you a member/beneficiary of an S-Corp, Partnership, Estate, Trust, Etc? Include all K-1	Yes	No
Did you make any Estimated Quarterly payments for this tax year to Federal and/or State?	Yes	No

FEDERAL Date Pd _____
FEDERAL Amount Pd _____
STATE _____ Date Pd _____
STATE Amount Pd _____

Do you require a Federal Identity PIN # to file your taxes? (A new <i>Pin Letter</i> required each year)	Yes	No
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Are you a Volunteer Fire Fighter/EMS? (Letter Required)	Yes	No
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We will need Documentation if claiming dependents other than your own children.

We will need Legal Documents if you are acting as Power of Attorney for someone.

Do you want a Paper Copy or Emailed Copy of your Tax Return?	Paper	Email
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BIG BEAUTIFUL BILL ACT ADDITIONAL QUESTIONS

Did you buy a NEW, US assembled personal vehicle in 2025 and pay interest on that loan? If yes, please include year, make, model, and VIN number	Yes	No
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Did you earn "time-and-a-half" or more for overtime hours in 2025?	Yes	No
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Are you age 65 or older in 2025?	Yes	No
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Did you have a child born in 2025? If yes, file form 4547 or trumpaccounts.com	Yes	No
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Did you adopt a child in 2025?	Yes	No
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Signature _____ **Date** _____



BANK ACCOUNT INFORMATION FOR DIRECT DEPOSIT

Bank Name	
Account Nickname	

Routing Number		
Account Number		
Account Type (pick one)	<input type="checkbox"/> Checking	<input type="checkbox"/> Savings

Taxpayer Name (printed)	
Taxpayer Signature	
Spouse Name (printed)	
Spouse Signature	
Today's Date	

By signing, you are confirming that the information is true and correct to the best of your ability.

In accordance with [Executive Order 14247, Modernizing Payments To and From America's Bank Account](#), signed on March 25, 2025, the U.S. Department of the Treasury, in coordination with the Internal Revenue Service and other federal agencies, is advancing the transition to fully electronic federal payments. This policy shift includes phase out of paper tax refund checks beginning Sept. 30, 2025, to the extent permitted by law.

The purposes of EO 14247 are to defend against financial fraud and improper payments, increase efficiency, reduce costs, and enhance the security of federal payments. Paper checks are over 16 times more likely to be lost, stolen, altered, or delayed than electronic payments. Direct deposit also avoids the possibility that a refund check could be returned to the IRS as undeliverable.

No changes are being made to the process of filing a tax return itself. Taxpayers will continue to file as usual, but refund delivery methods will shift to align with the executive order. The IRS will publish all guidance and information necessary for filing 2025 taxes before opening the 2026 tax filing season.



CLIENT PASS CODE/PIN SHEET

Taxpayer Name (printed)	
Taxpayer Signature	
Spouse Name (printed)	
Spouse Signature	
Today's Date	

By signing, you are confirming that the information is true and correct to the best of your ability.

Please Create a 4-Digit Pass Code

Taxpayer Pass Code	____ _
Spouse Pass Code	____ _