Please read through all of the following items to determine which pertain to you or your spouse for 2025.

Completed Tax Package and Forms In House Deadline: March 10th, 2026

Extensions may be filed for files received after this date

We will not be able to start preparing your return until we have the completed tax package in office.

Ways to send us your information:

Your client portal-

Drop off at Franklintown Fire Department

Mail

WHEN YOUR TAX RETURN IS READY, HOW WOULD YOU LIKE TO BE CONTACTED?

Please provide your current contact information and your preferred method of contact.

Unless indicated otherwise, we will contact you via text and email when your return is ready.

Taxpayer Cell Phone: ______________________________ Spouse Cell Phone: ______________________________

Taxpayer Email: __________________________________ Spouse Email: __________________________________

Preferred Contact Method: ____Text ____Phone Call ____Email

How would you like to receive your Tax Return? (If not checked, default is DocuSign)

_____PORTAL _____OFFICE PICK UP

FOREIGN ACTIVITY

Yes No *Please place an "X" in the correct column.*

Yes	No	
		Did you or your spouse receive or sell, exchange, gift or otherwise dispose of any **digital assets or virtual currency** such as Bitcoin, Ethereum, XRP, Litecoin, etc? *A digital asset is any virtual currency of value that functions as a medium of exchange, a unit of account and/or a store of value.* **If yes, indicate which platforms are used:**______________________________
		Did you or your spouse receive any foreign income?
		Did you or your spouse pay any foreign taxes **NOT** reflected on an included Form 1099?
		Did you or your spouse hold any assets (property) in foreign countries? **Initials** _____________
		Did you or your spouse have an interest in or signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account? **Initials** _____________
		Did you or your spouse receive a distribution from, or were you the grantor of, or transferor to, a foreign trust or have an interest in any foreign assets or accounts? **Initials** _______________

PERSONAL INFORMATION

Please place an "X" on the following lines and provide further details if any are applicable for your 2025 tax return.

______ Marital Status-Date of change and reason for change:______________________________

______ Address change from 2025 return:______________________________

______ Occupation Title Change: You______________________________ Spouse______________________________

______ State Tax Return(s) Required:______________________________

______ Legally Blind: You______ Spouse_______

DEPENDENTS: ***If you do not have any dependents, skip to "Income Items" and place an "X" here: ______***

Yes No *Please place an "X" in the correct column.*

Are there any changes in dependents from the prior year? Were any children born or adopted in 2025?**Indicate to ADD or REMOVE and complete all sections. Additions MUST provide a copy of SS card.**

Add Remove	Full Name	SSN	Date of Birth	Relationship

Did any of your dependents claim themselves on their own return in 2025? If yes, provide the name of the dependent. Did they earn more than $14,600 on a W-2? ____

Did you or your spouse have any childcare expenses in 2025 for children under the age of 13 years old? If yes, provide the name of the child, organization name, federal ID number and expense total.

____

Did you or your spouse have any children under age 19 or full-time students under age 24 at the end of 2025, with interest and dividend income in excess of $1,300 or total investment income in excess of $2,600

INCOME ITEMS

Please place an "X" on the following lines and provide further details if any are applicable for your 2025 tax return.

	Tax Form	**Description**	**How many forms did you receive?**
______	W-2	Employee Wages	________________
______	1099-INT	Interest Income	________________
______	1099-DIV	Dividend Income	________________
______	Sch K-1	S Corporation, Partnership or Trust Income	________________
______	SSA 1099	Social Security Benefits	________________
______	1099-G	Unemployment Compensation/State Tax Refunds	________________
______	W2-G	Gambling Winnings	________________
______	1099-B	Stock Sale Transactions	________________
______	3921 & 3922	Employer Stock Options	________________
______	1099-R	Retirement Plan Distribution or Rollover	________________
______	1099-Q	Distribution for Qualified Education Programs	________________
______	1099-C	Cancellation of Debt	________________

______ Student loan forgiveness from any federal or state forgiveness programs: Amount: _________________________

Submit forgiveness confirmation paperwork, along with any 1099-C Forms received

______ Installment Sale (Seller Financed) Contracts: Provide closing statement and amortization schedule

______ Disability Income (Non-taxable benefits): List type and amount: ____

______ Income from Legal Proceedings: List type and amount: ____

______ Alimony Received: Divorce Final Date: __________________ Amount: __________________________________

Name of Payor and SSN: ____

______ Jury Duty Pay: Amount received: You____________________________ Spouse_______________________________

______ Prizes and Awards: Type and amount:____

______ Tip Income of more than $20: Amount if not reported to your employer ___________________________________

NEW Reporting Requirements for Businesses

If you own a state registered entity, it is highly likely you will be affected by the Corporate Transparency Act's Beneficial Ownership Information Reporting (BOI) Requirements. This will require you to file an initial report with FinCEN and carries a $591 daily penalty for not adhering to the deadlines. We want to ensure you are aware of these requirements and strongly encourage you to become familiar with them. For more info, please visit our Business Resources tab of our webpage

NEW IRS ONLINE BUSINESS ACCOUNT

Did you know that you can set up an IRS Online Business Account to view your business tax information online?
Check out here! **If you have multiple entities, you only need ONE account to access them all.*

SELF EMPLOYED, FARM, RENTAL, ROYALTY INCOME ITEMS & NEW BUSINESS ACTIVITIES

If you do not have ANY of the above AND did not start a new business, skip to "Deduction and Expense Items" and place an "X" here: _______

Please place an "X" on the following lines and provide further details if any are applicable for your 2025 tax return.

	Tax Form	Description
______	Form 1099-NEC	Nonemployee Compensation
______	Form 1099-MISC	Nonemployee Compensation, Rental Property, Royalty and/or Farm Income
______	Form 1099-PATR	Farm Patronage Dividends

Yes No *Please place an "X" in the correct column.*

If you received any of the above forms, answer the following questions:

Yes	No	
		Are you submitting financial statements or the Schedule C, E or F worksheet provided on our Individual Resources tab of our webpage? If yes, indicate which one(s): ________________________________
		Are any of these businesses formed as a Single-Member LLC? If yes, indicate which one(s): ________________________________
		Was your home rented out or used regularly and exclusively for a business? If yes, provide name of business, total square footage of the entire home & square footage of the office space: ____________________________

____

NEW BUSINESS ACTIVITIES:

Please place an "X" on the following lines and provide further details if any are applicable for your 2025 tax return.

	Description	Details
______	Started a business:	________________________________
______	Started a farm:	________________________________
______	Purchased rental property:	___________Commercial Property ___________Residential Property
______	Purchased royalty property:	________________________________
______	Acquired an interest in a Pass Thru Entity:	__________S Corporation __________Partnership __________Trust
______	Purchased business assets: Provide details on financials or Schedule C, E or F worksheets	
______	Disposed of business assets: Provide details on financials or Schedule C, E or F worksheets	

DEDUCTION AND EXPENSE ITEMS

Please place an "X" on the following lines and provide further details if any are applicable for your 2025 tax return.

	Tax Form	Description	How many forms did you receive?
______	Form 1098	Mortgage Interest Statement	________________
______	Form 1098-T	Tuition Statement	________________
______	Form 1098-E	Student Loan Interest	________________

DEDUCTION AND EXPENSE ITEMS cont'd

Please place an "X" on the following lines and provide further details if any are applicable for your 2025 tax return.

______ Form 1095-A* Health Insurance Coverage thru Marketplace ________________

**** To receive the health insurance credit, attach all forms. The IRS will not process your return if this form is not reported. The 1095-A Form is not the same as the 1095-B or 1095-C Forms. Please do not place an X here if you received B or C Forms.***

Description and Details

______ Expenses paid as an EDUCATOR (Elementary or Secondary) You: $________________ Spouse: $_________________

The max deduction is $300 per person.

______ Books and Supplies Paid as a STUDENT or for your STUDENT Dependent: Paid For: ___________________________

Books $_____________________ Supplies $_____________________

______ Scholarships and/or Fellowships received: Description and amount: _______________________________________

______ Household employees: Forms Filed:____

______ Alimony Paid: Divorce Final Date: ______________________ Amount: ___________________________________

Name of Payee and SSN: ____

______ Adoption Expenses: Amount: ____

______ Moving expenses due to a permanent change of station for **Armed Forces**: List # of miles

Old home to new work ___________ Old home to old work _____________ Old home to new home ___________

Please provide dates and amounts. ____

PURCHASES, SALES AND DEBT

Yes No *Please place an "X" in the correct column.*

Yes	No	
		Did you or your spouse sell or do you plan to sell any dividend generating stocks or mutual funds during the first 60 days of 2026?
		Did you or your spouse purchase, sell or refinance (no cash out) your principal home or second home? **If yes, please circle which applies and provide the HUD/Closing Statement from the sale and/or purchase of home(s) and Form 1099-S if received.**
		Do you have a home equity loan or a cash out refinance? ***If yes, did you or are you planning on using 100% of the funds to build or improve your main home?*** Details: ______________________________
		Did you or your spouse purchase a home in 2025 while you were overseas on official extended duty?
		Did you or your spouse receive a new homebuyer credit on your 2008 income tax return?
		Did you or your spouse make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources? If yes, please attach receipts.
		Did you or your spouse purchase a clean energy (electric) vehicle? If yes, provide paperwork.
		Does anyone owe you money which has become uncollectible?

If yes, please provide the amount and how the debt became uncollectible. ___________________________________

____

____

RETIREMENT PLANS: ***If you did not make any retirement contributions, skip to "Itemized Deductions" and place an "X" here: ______***

Yes No *Please place an "X" in the correct column.*

Please skip the following question if you ONLY made retirement plan contributions through your employer. If you made retirement plan contributions outside of your employer's offered plan, please check off the type of plan and the amount contributed by each you and your spouse.

☐ ☐ Did you or your spouse already contribute or plan to contribute to a retirement plan? If yes, indicate which type of plan. You may be able to contribute thru 4/15/2026 for the 2025 tax year for both IRA's and SEP plans.

Type of Plan:	Taxpayer	Spouse
_____ 401(k) ***NOT from your W2**	$_________________	$_____________________
_____ Traditional IRA (Pre-tax)	$_________________	$_____________________
_____ SEP	$_________________	$_____________________
_____ SIMPLE	$_________________	$_____________________
_____ ROTH IRA (Post-tax)	$_________________	$_____________________

☐ ☐ Did you or your spouse convert part or all of your traditional, SEP, or SIMPLE IRA to a Roth IRA in 2025?
If yes, have you ever made any nondeductible contributions to those plans? This includes 2025 and all previous years:
List type of plan & amount: ____

ITEMIZED DEDUCTIONS: ***If you are NOT itemizing & you are taking the standard deduction, skip to "Estimated Taxes" and place an "X" here: ______***

Yes No *Please place an "X" in the correct column.*

☐ ☐ Did you or your spouse pay any out of pocket medical expenses, **not including any health insurance premiums?**
If yes, how much? ____

☐ ☐ Did you or your spouse pay any health insurance premiums **directly to an insurance company and not through an employer plan that was deducted from your paycheck?** If yes, how much? ____________________

Description and Details

______ Long term care insurance premiums paid: You______________________ Spouse________________________
______ Medical miles driven: Amount ____
______ Cash Gifts to charity: Amount: ____
______ Non-Cash Gifts to Charity, if over $500, please provide details:
Type of Items:____
Original Cost: ______________________________ Total Value:______________________________
______ Charitable miles driven: # of Miles: ____

☐ ☐ Did you or your spouse pay property taxes, **not included on your 1098 Form?**
If yes, how much was paid in 2025? ____

☐ ☐ Did you or your spouse incur a loss because of damaged or stolen personal property? If yes, please provide date, description of property, and fair market value. ____

☐ ☐ Were you reimbursed by your insurance company for the above property in an amount greater than the fair market value? If yes, how much was the total reimbursement? ________________________________

☐ ☐ Did you or your spouse pay sales tax from the purchase of a car, boat, tractor, or major home improvements?
If yes, indicate which purchase and how much? ____

ESTIMATED TAXES

Yes No *Please place an "X" in the correct column.*

VERY IMPORTANT
Inaccuracies will slow down the processing, in addition to changes made to your refund or tax due.

☐ ☐ Did you or your spouse make estimated tax payments for the 2025 tax year?
If yes, please provide the date and amount for each payment below.
Date: ______________________________ Amount: ______________________________
Date: ______________________________ Amount: ______________________________
Date: ______________________________ Amount: ______________________________
Date: ______________________________ Amount: ______________________________

☐ ☐ Did you or your spouse apply an overpayment of 2024 taxes to your 2025 estimated tax **(instead of being refunded)?** If yes, how much was the overpayment?________________________________

☐ ☐ If you have an overpayment of 2025 taxes, do you want the excess applied to your 2025 estimated tax **(instead of being refunded)? If you have an unpaid tax liability, be aware the IRS may apply the refund to the outstanding tax due and not the tax year indicated.**

☐ ☐ If you owe taxes for 2025, do you anticipate needing an installment agreement filed with the tax return?

☐ ☐ Do you have an existing installment agreement with the IRS?
If yes, please list years:____

☐ ☐ Do you expect your 2026 taxable income and withholdings to be different from 2025?
If yes, would you like tax planning services? ____

MISCELLANEOUS

Yes No *Please place an "X" in the correct column.*

☐ ☐ Would you like us to file an extension on your behalf if all of your information is not in our office by March 10th?

☐ ☐ We are required to electronically file (e-file) your tax return. Do you have a reason to opt out of e-filing?
If yes: ____

☐ ☐ May the IRS discuss your tax return with your preparer?

☐ ☐ Do we have permission to contact your investment broker to receive financial information pertaining to income items to be reported on your return? If yes, provide contact information:________________________
____

☐ ☐ Did you or your spouse ***make*** any gifts of $18,000 or more to any one person or to a trust?

☐ ☐ Did you or your spouse ***receive*** any gifts of $18,000 or more from one person or from a trust?

☐ ☐ Were you notified or audited by either the Internal Revenue Services or the State taxing agency?
If so, please explain: ____
____

☐ ☐ Did you or your spouse have a medical savings account(MSA), a health savings account(HSA), a Medicare + Choice MSA or acquire an interest in an MSA or a Medicare + Choice MSA because of the death of the account holder?

☐ ☐ Do you or your spouse plan to contribute to an Archer MSA or HSA for the 2025 tax year by 4/15/2026?
If yes, provide amount and type of account. ____

☐ ☐ Were you a policyholder who received payments under a long-term care (LTC) insurance contract or received any accelerated death benefits from a life insurance policy?

MISCELLANEOUS cont'd

Yes No *Please place an "X" in the correct column.*

Yes	No	
		Did you or your spouse receive a distribution from an Achieving a Better Life Experience (ABLE) savings account?
		Did you or your spouse cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?
		Did you or your spouse participate in any bartering transactions, including the use of virtual currency/digital assets?
		Do you want to allocate $3 to the Presidential Election Campaign Fund? You __________ Spouse __________
		Did you, your spouse or any of your dependents receive an identity protection personal identification number (IP PIN) from the IRS during 2025? If yes, provide a copy of the IRS notice.

IRS Online Individual Taxpayer Account

Did you know that you can set up an IRS Online Individual Account to view your tax information online, such as IRS notices, tax transcripts, balances, payments and more? Check out the link below to learn how!
https://www.irs.gov/payments/your-online-account

DIRECT DEPOSIT & BANK INFO

Yes	No	
		Do you want to directly deposit any refunds? **If yes, please provide your banking information below.** If your banking information hasn't changed from last year, we will use the account you provided for your 2023 refund.
		Do you want to pay any tax liability via ACH from your bank account when your return is filed? **If yes, provide the max amount $_______________ and account it should be deducted from below. If the total taxes owed exceed this amount, we will discuss with you before proceeding with this option.**
		Did your bank account information change within the last twelve months? If yes, and you want your refund directly deposited or your tax liability taken out of your account, **provide the correct account information below.**

Bank Name ____

Routing # ______________________________ Account # ___________________________________

As we have questions, we will contact you. If you have any questions, concerns or would like to discuss your return prior to or after preparation, please indicate below.

SIGNATURES

Taxpayer:____

Spouse:____