

ACCURATAX LLC

2025 QUESTIONS FOR TAX PREP

Tax Payer Name _____ Cell Phone _____

Email _____ Spouse Email _____

*****SECTION BETWEEN ASTERISKS ONLY FOR NEW CLIENT*****

****NEED COPY OF PREVIOUS YEAR TAX RETURN****

Tax Payer Social Security No _____ DOB _____

Spouse _____ Soc Security No _____ DOB _____

Address _____

(Direct Deposit Info)

If your bank info is same as 2024 - please list last 4 of acct _____

(If new acct please list below.)

Bank Name _____ Routing No. _____ Account _____

- 1) Did your home address change in 2025? ☐ NO ☐ YES (Yes, list address in notes)
- 2) During 2025, did you receive a reward, award, payment or sell, exchange, gift or dispose of a digital asset (bitcoin, etc)? ☐ NO ☐ YES
- 3) Do you have any foreign accounts ☐ NO ☐ YES
If Yes is total of all foreign accts more than \$10,000? ☐ NO ☐ YES
- 4) Do you have an HSA (Health Savings Account)? ☐ NO ☐ YES
IF YES, NEED DISTRIBUTION FORM.(1099-SA) or amount withdrawn for medical.
- 5) Do you have MARKETPLACE insurance?(OBAMACARE) ☐ NO ☐ YES
IF YES, WE NEED YOUR 1095A TAX FORM.
- 6) Did you pay ESTIMATED tax payments for 2025? ☐ NO ☐ YES
IF YES, PLEASE PROVIDE AMOUNTS AND DATES PAID. (List Dates if not Due Date)
Apr 15 _____ /June 15 _____ /Sept 15 _____ /Jan 15 _____
- 7) Did you sell or buy a house in 2025? ☐ NO ☐ YES
- 8) Do you have any dependents? ☐ NO ☐ YES (If yes, please fill out page 3)

NOTES:

NOTE: This page is FYI to assist you with forms you may need to include for tax prep.

Income and Deductions

☐ W2 Forms (Wages)
☐ 1099_NEC (Contract Work)
☐ 1099_MISC (Other Income)
☐ 1099-INT or December Bank Statement (Banking Interest)
☐ Unemployment (Form 1099-G)
☐ Retirement Benefits (1099-R)
☐ Social Security Benefits
☐ Alimony Received
☐ HSA Contributions and Distributions 2024
☐ Daycare expenses
☐ College Education loan interest
☐ 1098T College Education (Other Required Books/Materials)
☐ Educators Credit (Limit of \$350 school supplies)
☐ 1099-B sold mutual funds or stock (Need Sell & Buy amounts)
☐ 1099-DIV if you receive dividends from Mutual Funds or Stock
☐ IRA Contributions for 2023 (Don't need Roth Information)
☐ Last years refund card from State

IF YOU ITEMIZE HERE ARE THE ITEMS YOU MAY BE ABLE TO USE.

(In order to itemize the sum of all items below have to be higher than the Standard Deductions listed.

(MFJ \$31,500, Single \$15,750, Household \$23,625)

1098 (House Interest)
Property taxes (2024 taxes paid in 2025)
New Vehicle Purchase in 2025 (Please supply sale receipt)
Cash contributions paid to Non-Profits
Gift contributions given to Non-Profits
Medical Expenses Out of Pocket NOTE: CANNOT BE FUNDS HSA PAID
Medical Premiums (Employee paid insurance can't be used))
Long Term Care Payments

RENTAL PROPERTY: (Rental worksheet on AccuraTax Website)

Rental Income
Mortgage Interest
Property Taxes
Property Insurance
Supplies
Repairs
Assets purchased. (Roof, Appliances, Vehicle)

NOTES: _____

THIS SECTION FOR CLIENTS WITH DEPENDENT CHILDREN

ONLY LIST NEW CLIENTS CHILDREN OR CHILDREN BORN IN 2025.

Name _____ Social _____ DOB _____

Name _____ Social _____ DOB _____

Name _____ Social _____ DOB _____

Name _____ Social _____ DOB _____

1) Is your dependent unmarried? ___Yes ___No

2) Could another person qualify to claim your child? ___Yes ___No

3) Did the child live with you over ½ of the year? ___Yes ___No

4) Is your dependent a citizen of the United States? ___Yes ___No

5) Have you ever been disallowed child tax credits? ___Yes ___No

6) Please provide one piece of documentation that helps support
the child as a dependent?

(Medical Insurance, Medical Record, School Record, Childcare
Provider Records, Social Services Statement, Employer Statement)

7) Do the answers to the above questions apply to all your
dependents? ___Yes ___No

Other Optional Questions:

1) If this child isn't your child, why is the parent not
claiming the child?

Notes: _____

If Dependent became 17 or older in 2024 answer questions below.

1) Was the dependent in High School or College anytime in 2024?
___Yes ___No

2) If no, did dependent earn more than \$4700?

NOTES:

AccuraTax LLC Phone (970) 310-5232 Fax (970) 679-1673

Email: todd@accurataxllc.com Website: www.accurataxllc.com

(PLEASE PROVIDE A PROFIT & LOSS STATEMENT)

NOTE: AccuraTax has a usable P&L on the website

Name of Business _____
Business Product or Service _____
EIN or Social Security Number _____
How many years have you owned business _____
Year the business started _____

Possible Deductions:

Advertising
Contract Labor
Payroll & Payroll Taxes
Office expenses
Rent or Leases paid
Taxes & Licenses
Travel expenses
Meals WITH CLIENTS/EMPLOYEES (100% if in restaurants for 2022)
Meals at Meetings WITH EMPLOYEES (100%)
Gifts to Clients (Limit is \$25 per client)
Interest or Penalties on loans or credit cards for business.
Legal & Professional expenses
Cell phone or Business phone (Percentage for Business)
Internet (reasonable % used for Business)
Repairs and Maintenance
Tools and/or Material expenses
Insurance expense (Business Insurance Only)
Medical Insurance (Medical Premiums are deductible if self
employed and you nor your spouse has ACCESS to employee
insurance through a W2 job)

VEHICLE EXPENSES - AccuraTax has a Vehicle worksheet on website.

Vehicle Year and Model
Purchase Price
Date vehicle put in business
Odometer reading beginning of year and end of year
(Miles Method) Business miles driven / Personal miles driven
(Actual Expenses Method)-(Gas, Insurance, License, Maintenance)
Need miles driven for the business if personal vehicle.

HOME OFFICE EXPENSE - AccuraTax has a Home Office worksheet on website.

Full House square footage
Home Office square footage
House Market Value (Generally this is Purchase Price)
Cost of any major improvements to property this year
Mortgage Interest or Rent
Property Taxes
Property Insurance
Utilities (Gas, Electric, Trash)
HOA Fees

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