

2025

6323-400-8980

Part I – Personal Information

Taxpayer:	Spouse:
Last name	Last name (if different)
First name	First name
Middle initial Suffix	Middle initial Suffix
Middle name	Middle name
Social security no.	Social security no.
Check if SSN is not valid for employment ☐	Check if SSN is not valid for employment ☐
Occupation	Occupation
Date of birth (mm/dd/yyyy)	Date of birth (mm/dd/yyyy)
Age as of 1-1-2026	Age as of 1-1-2026
Date of death	Date of death
Legally blind ☐	Legally blind ☐
E-mail address	E-mail address
Work phone Ext	Work phone Ext
Cell phone	Cell phone
Home phone	
Fax number	

Note: Work phone is transmitted for electronic funds withdrawal.

Best contact phone number
Print phone number on Form 1040 . . . ☐ Home ☐ Taxpayer work ☐ Spouse work
Print Form 1040-SR instead of Form 1040 ☐ Yes ☒ No

US Address:

Address Apt no.
City State ZIP code
County

Foreign Address: Check this box to use foreign address . . . ☐

Address Apt no.
City
Foreign code Foreign country
Foreign province/county Foreign postal code
Foreign phone

APO/FPO/DPO address . . . ☐ APO ☐ FPO ☐ DPO

Part II – Federal Filing Status

- ☐ 1 Single
- ☐ 2 Married filing jointly
- ☐ 3 Married filing separately
- ☐ Taxpayer did not live with spouse at any time during year
- ☐ Taxpayer eligible to claim spouse's exemption (state use), blind, or over age 65 (see Help)
- ☐ 4 Head of household
- If qualifying person is child but not dependent:
- Child's First name MI Last Name Suff
- Child's social security number
- ☐ 5 Qualifying surviving spouse
- Year spouse died ☐ 2023 ☐ 2024
- Enter the qualifying person's name:
- Child's First name MI Last Name Suff
- Child's social security number
- ☐ Check if treating a nonresident or dual-status alien spouse as a U.S. resident for the entire tax year, enter name here: ☐ Check if this is the first year

Part III – Dependent/Earned Income Credit/Child and Dependent Care Credit Information

First name Last name	MI Suff	Social security number *Relationship	Date of birth (mm/dd/yyyy) Date of death (mm/dd/yyyy)	Months lived with taxpayer a) in 2025 b) in the US	A g e E I C	Dependent Identity Protection PIN (see tax help)		Qualified child/dep care exps incurred and paid 2025		Not qual credit other dep Not qual for child tax credit Or non U.S.**
						Check if Full- time student	Educ Tuition and Fees	Child Disa bled Code		
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* Caution: If claiming child other than taxpayer's see **Relationship** in Help

** Caution: If this person is NOT a U.S. citizen, U.S. national, or a U.S. resident check this box

Part IV – Earned Income Credit Information**Required to Calculate EIC:**

Yes No

☐ ☐

Is taxpayer or spouse qualifying child for EIC for another person?

Was taxpayer's (and spouse's if married filing jointly) home in United States
for more than half of 2025?

Check Any that Apply:
☐

Taxpayer filing as head of household and lived with nonresident alien spouse during last six
months of 2025

☐

Taxpayer notified by IRS that EIC cannot be claimed in 2025

☐

Do not wish to claim EIC

Part V – Return Preparer and Third Party Designee Information

Enter preparer code from Firm/Preparer Info (See Help) . . . 1

If not signing as preparer, have following printed instead of firm information:

☐

"Self-Prepared"

☐

"Non-Paid Preparer"

Third Party Designee: (See Help)

Caution: Review transferred information for accuracy

☐

Paid preparer is third party designee (if checked, do not complete designee information)

Designee's name

Designee's phone number

Personal identification number (enter any 5 numbers)