

LARSON TAX SERVICE, INC.

2025 TAX SEASON INFORMATION FORM

CLIENT INFORMATION

DATE: _____

TAXPAYER NAME: _____ OCCUPATION: _____

SPOUSE NAME: _____ OCCUPATION: _____

BEST PHONE #: _____ EMAIL: _____

PREFERRED METHOD OF CONTACT: ☐ PHONE CALL ☐ EMAIL

STREET ADDRESS: _____ APT/UNIT #: _____

CITY: _____ STATE: _____ ZIP CODE: _____

DID YOU MOVE IN 2025?: ☐ YES ☐ NO

DO YOU OWN OR RENT YOUR HOME?: ☐ OWN ☐ RENT

(If renting please list amount paid for 2025, Massachusetts residents only)

DRIVERS LICENSE/IDENTIFICATION

(This information is mandatory for electronic filing. Please fill out both if married.)

1. LICENSE OR DOCUMENT #: _____ STATE OR ISSUER: _____

ISSUE DATE: _____ EXPIRATION DATE: _____

2. LICENSE OR DOCUMENT #: _____ STATE OR ISSUER: _____

ISSUE DATE: _____ EXPIRATION DATE: _____

FAMILY INFORMATION

ANY BIRTHS OF DEPENDENTS IN 2025?: ☐ YES ☐ NO

(If you checked yes, please list name, date of birth and social security number)

PLEASE LIST THE NAMES OF DEPENDENTS BEING CLAIMED FOR 2025: _____

(If you are including any family members' tax information please make sure it is separated from your tax information.)

DIRECT DEPOSIT INFORMATION

WOULD YOU PREFER DIRECT DEPOSIT? ☐ YES ☐ NO (If yes, banking information is required)

BANK NAME: _____ ACCOUNT TYPE: ☐ CHECKING ☐ SAVINGS

ROUTING #: _____ ACCOUNT #: _____

ADDITIONAL INFORMATION

WERE THERE ANY CHANGES FROM THE PRIOR YEAR? ☐ YES ☐ NO

(If you checked yes, please list the changes from the prior year)

**PLEASE HAVE PAPERWORK TO US BY SATURDAY, MARCH 13, 2026
OTHERWISE YOU MAY BE PLACED ON EXTENSION**

CONTINUE ONTO THE REVERSE SIDE FOR OUR 2025 TAX SEASON CHECKLIST

2025 TAX INFORMATION CHECKLIST

TO HELP YOU ORGANIZE YOUR TAX INFORMATION

SOME MAY APPLY TO YOU, SOME MAY NOT.

- ☐ Copies of all W-2(s) and 1099(s) reporting wages, gambling winnings, interest, dividends, pension/retirement distributions, unemployment compensation, social security benefits and any miscellaneous income
- ☐ Brokerage statements regarding the sale of stock, original cost and purchase date of stock (many of these statements are issued online only)
- ☐ Copies of K-1 forms from investment in a business entity
- ☐ Names, social security numbers and dates of birth for all dependents and any changes regarding these dependents in 2025
- ☐ Names, address, tax ID numbers and amounts paid to all childcare providers
- ☐ Documentation for college tuition paid and amounts for books for classes, and/or student loan interest paid (must have Form 1098-T for tuition deduction)
- ☐ Real estate taxes, town vehicle taxes, sales tax on motor vehicles
- ☐ For MA residents age 65 or older who rent or pay real estate taxes: water and sewer bills
- ☐ Mortgage interest paid and any closing documents if you bought, sold or refinanced
- ☐ Medical insurance, prescriptions, doctors, dentists, glasses and medical mileage amounts only if you itemize (please write down totals rather than bringing in all of your prescription papers)
- ☐ Charitable donations: church, cash, noncash, etc. and charitable mileage with receipts
- ☐ For all MA residents who rent: list the amount of rent paid
- ☐ Contribution amounts to an IRA, ROTH, 401k, 403B
- ☐ For self-employed clients: records of income and expenses from self-employment activity (please provide a prepared profit and loss)
- ☐ For self-employed clients: copies of all 1099s issued to others (subcontractors, etc.)
- ☐ For self-employed clients: business use of vehicle mileage amount (total miles, commuting miles and business miles driven) and auto expenses. Please provide a mileage log. One is available on our website www.larsontaxservice.com.
- ☐ Record of the dates and amounts of estimated tax payments made for 2025
- ☐ Theft or casualty loss information
- ☐ For clients with rental properties: records of rent collected and expenses involving the rental activity
- ☐ Records of any alimony paid or received
- ☐ Proof of health insurance: if you acquired health insurance through the Marketplace a form 1095-A is required to file your tax return
- ☐ Any notable changes: purchase/sale of a property, births, marriages, changes in employment, etc.
- ☐ For new clients: please bring a copy of your 2024 tax return and a government issued ID