

Client Information Form Tax Year 2025**New Client?** Yes No**Which Tax Preparer do you prefer?****Today's Date:** _____

Bart Craig Rochelle

Primary Tax Payer Information:**Spouse Information**

Full Name:

Full Name:

SSN (last 4 digits):

DOB:

SSN (last 4 digits):

DOB:

Mailing Address:

Mailing Address:

City:

State:

Zip Code:

City:

State:

Zip Code:

Phone Number:

Main # to call:

Phone Number:

Main # to call:

E-Mail Address:

E-Mail Address:

Occupation Title (if new or changed job):

Occupation Title (if new or changed job):

Drivers License # (if expired in 2025):

Drivers License # (if expired in 2025):

Issue Date:

Exp. Date:

Issue Date:

Exp. Date:

Filing/ Marital Status:

Single

Head of Household

Married Filing Joint

Married Filing Separate

Can anyone claim you as their dependent?

Yes

No

FAQ: Why do I have to fill this out every year?

Answer: This form is part of our Due Diligence as tax preparers. We are required by law from the IRS to have this on file. It is also necessary in avoiding errors and amendment fees.

Direct Deposit Information:

If same, write last 4 digits of Acct # here: _____

Account # (if new): _____

Routing #: _____

Name of Bank: _____

Checking Acct

or

Savings Acct

When dropping off your paperwork, PLEASE have your documents ready and out of their original envelopes. We REALLY appreciate it! Thank you!

Dependents: List the names of ONLY the dependents you care for and can claim. Check the "Student" box next to their name if they are a full time college student. If your dependents are the same as last year, only write their name (you do not have to fill out the rest of the columns). Do not list yourself as your dependent.

| Name: | Student: | Relationship: | SSN: | DOB: |
|--------------|-----------------|----------------------|-------------|-------------|
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Your Income Tax Situation: Select all that apply to you or your spouse.

Do your rent or own your home? **Rent** **Own**

Income sources:

W2 Income - List # of W2' Forms: _____

Unemployment (include form 1099-G)

Social Security Income (include form SSA-1099)

Retirement - List # of 1099-R Forms: _____

Interest Income (include 1099-INT)

Dividends (include form 1099-DIV)

Stock Sales (include 1099-B)

Self Employment Income/ 1099-NEC (include list of your expenses and notate your occupation pertaining to the self employment)

Rental Property (include list of expenses)

Virtual Currency

W2G for Gambling Winnings (include losses)

Credits/ Deductions:

College Tuition (include 1098-T form)

Paid student loan interest (include form 1098-E)

Had health insurance via Covered CA (also known as "Obama Care") (include form 1095-A)

Paid for child care/ daycare (include statement with amount paid, name/ address/ and EIN of provider)

Sold or Purchased a house (include final closing cost statement from Escrow)

Paid or Received Alimony prior to Jan. 1, 2020

Last paystub of the tax year if you were paid overtime

Car Loan Interest (if you purchased a new car in 2025 that was assembled in the USA, include your last billing statement of the year as well as the vehicles VIN, year, make, and model)

E-Mail: Roybal@RoybalTax.com

Covina, CA 91724