

ADDITIONAL REQUIRED INFORMATION

Referred By: _____

Other Information Required:

Do you Rent or Own your home? Circle One

Rent Amount per Month \$ _____ How Long Rented? _____

Landlord's Name and Address:

School District-IN ONLY: _____

IN County Lived on January 1st: _____ IN County Worked on January 1st: _____

Are you a NEW Sate Resident? Complete the next two questions:

1. Dates moved IN or OUT (circle one) of State: IN _____ OUT _____
2. State moved TO or FROM (circle one): _____

Please answer the following for INDIANA:

- Are you a retired Civil Servant
- Are you Retired Military or Receive Survivor Benefits from the Military? Taxpayer Spouse
- Are you Reserve National Guard?
- If yes, was any of your income from involuntary orders?
- Were you mobilized and deployed for full-time service; or was your unit federalized? Yes No
- How many eligible Children attending home school or Private School: Elem-High School Only _____
- Did you contribute to a College Choice 529 Plan?
- If yes, Did you provide statements with account numbers for each eligible student?
- Did you donate to a Private School or Indiana College?
- If yes, Did you provide statements with date, amounts, and name of institution?
- Are you and/or your Spouse Public School Teachers(s) in Indiana K-12? Taxpayer Spouse
- Do you pay Partnership Long Term Care Policy Premiums?

Please answer the following for FEDERAL:

- Did you have Overtime? If so, please provide all final YTD paystubs (if you have multiple jobs)
- Did you have Qualified Tips? If so, please provide your daily tips sheets.
- Did you purchase a new car in 2025? If so, please provide dealer paperwork.
- Did you receive a 1095-A from the marketplace for Health Insurance? (i.e. Healthcare.gov)
- Are you still paying on first-time home-buyer credit from 2008?
- Unemployment received? Yes No Form 1099-G
- Do you have an HSA? Yes No
- If yes, Form provided: 5498-SA 1099-SA*
- Do you normally claim any of the following credits:
 - Earned Income Credit
 - Child Tax Credit
 - Advanced Child Tax Credit
 - American Opportunity Credit
- If yes, Did you provide statements with date, amounts, and name of institution?
- Please provide proof that the child or dependent lives with you.
- Do you want us to open Trump Accounts for your child(ren)-Form 4547?

Cell number you want to receive texts from our portal: _____

If you do not want to receive texts from our portal please check here: _____

Payment of Tax Preparation Fees: CASH/CHECK CREDIT/DEBIT TAX REFUND

Mother's Maiden Name (ONLY if paying through Tax Refund): _____

New Clients: How did you hear about us? _____

Other Information Necessary to prepare your taxes: _____
