

## 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:**

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School District-IN ONLY: \_\_\_\_\_

IN County Lived on January 1<sup>st</sup>: \_\_\_\_\_ IN County Worked on January 1<sup>st</sup>: \_\_\_\_\_

**Are you a NEW State 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.

**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:**

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