

"2025" RETURNING CLIENT

Name: _____ SSN: _____
Spouse: _____ SSN: _____
Phone number: _____ Email: _____

ALL MARRIED FILING SEPARATELY OR HEAD OF HOUSEHOLD FILERS, WHETHER A NEW CLIENT OR A RETURNING CLIENT, MUST ALSO COMPLETE THE BACK OF THIS FORM EVEN IF THERE HAVE BEEN NO CHANGES!

IMPORTANT: (Must be answered for all clients)

Foreign Accounts, Virtual Currency

Do you have any foreign accounts, investments or virtual currency transactions? YES NO

If yes, please explain: _____

Health Insurance

Do you have health insurance through the Affordable Care Act? (Obama Care) YES NO

If yes, please provide form 1095-A

Are we using the same direct deposit / bank account as last year? YES NO

IF NO, PLEASE PROVIDE A VOIDED CHECK. PAPER CHECKS WILL NO LONGER BE SENT BY THE IRS

DID YOU PURCHASE A NEW CAR IN 2025? YES _____ NO _____

IF SO, PLEASE ASK FOR SEPARATE INFORMATION QUESTIONNAIRE

Are Tips or Overtimes included in your wages YES _____ NO _____

Provide last paystub if Overtimes not identified on your W-2

CHANGES ONLY: If no other information has changed, the following can be skipped. If changes, please indicate below.

Mailing address: _____

Dependents:

Add: _____ Remove: _____

Add: _____ Remove: _____

Filing status, if changed: Single Married Head of Household Married Filing Separately

***Please provide a copy of your updated driver's license and a copy of social security card(s) and birth certificates for any dependents that you are adding this year. ***

More on Back...

If Married Filing Separately or Head of Household:

Have you lived with your spouse for the last 6 months of the year?

YES

NO

Have you lived with your spouse one day during the past year?

YES

NO

Filing Status – Head of Household

The IRS could require additional information/documentation if you are divorced, legally separated, or married and did not reside with your spouse the last 6 months of the year to determine if you qualify for the head of household filing status.

1. Marital Status:

- a. Never married
- b. Spouse deceased
- c. Divorced, separated
- d. Married but lived apart from spouse during the last 6 months of the year
- e. Separation agreement

2. If you are divorced or legally separated, can you provide the IRS with any of the following documents?

- a. Divorce decree – Date: _____
- b. Separate maintenance agreement or separation agreement – Date: _____

3. If you are married but did not reside with your spouse for the last 6 months of the tax year, can you provide the IRS with any of the supporting documents verifying that your spouse did not live with you?

- a. Not applicable
- b. Lease agreement
- c. Utility bills
- d. Letter from a clergy member
- e. Letter from social services
- f. Other supporting documentation

If so, what type of documentation? _____

4. Can you provide the IRS with receipts and bills substantiating the cost of maintenance more than half of the cost of the home? Documentation that the IRS requires to substantiate the cost of maintaining the home includes:

- a. Utility bills
- b. Rent receipts or mortgage interest statement
- c. Property tax bills
- d. Maintenance and repair bills
- e. Grocery receipts
- f. Other household bills

5. Did you receive any non-taxable support/income?

- a. Family support
- b. Childcare assistance
- c. Food stamps
- d. Housing assistance

Other: _____