

"2025" NEW CLIENT

Taxpayer Name: _____

DOB: _____ SSN: _____

Spouse's Name: _____

DOB: _____ SSN: _____

Are you legally married? YES NO **IF MARRIED FILING SEPARATELY OR HEAD OF HOUSEHOLD, FILERS MUST ALSO COMPLETE THE BACK OF THIS FORM.**

Total dependents you are claiming: (List ALL Dependents)

Name: _____ DOB: _____ SSN: _____ Relationship: _____

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Are you claimed as a dependent on another tax return? YES NO

What is your current telephone number(s)? _____

What is your email address? _____

What is your mailing address? _____

What is your filing status for 2025?

Single

Married

Head of Household

Married Filing Separately

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

IF SO, PLEASE ASK FOR SEPARATE INFORMATION QUESTIONNAIRE

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

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

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

If you receive a refund, please provide a voided check for direct deposit. **PAPER CHECKS WILL NO LONGER BE SENT FROM THE IRS**

We will need to make copies of a valid driver's license for both taxpayer & spouse, social security cards taxpayer/spouse/dependent(s) and birth certificates for all dependents.

If married filing separately:

Have you lived with your spouse for the last 6 months of the year? Yes No

Have you lived with your spouse for 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:

- Never Married
- Spouse deceased
- Divorced, separated or spouse deceased
- Married but lived apart from spouse during the last 6 months of the year
- Separation agreement

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

- Divorce decree: Date: _____
- Separation 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?

- Not applicable
- Lease agreement
- Utility bills
- Letter for a clergy member
- Letter from social services
- Other supporting documentation. If so, what type of documentation? _____

4. Can you provide the IRS with receipts & 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 utilities:

- Utility bills
- Rent receipts or mortgage interest statement
- Property tax bills
- Maintenance and repair bills
- Grocery Receipts
- Other household bills

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

- Family support
- Childcare assistance
- Food stamps
- Housing assistance
- Other: _____