



4466 Elvis Presley Blvd Ste 142
Memphis TN 38116
Office: 901-672-7814 Cell: 901-488-4656

Tax Check List For 2025 Tax Season

1. How many jobs did you work in 2025? _____ (W2's)
2. Where you Self-employed in 2025? _____ (1099NEC)
3. Did you Receive Unemployment in 2025? _____ (1099G)
4. Did you Receive Social Security in 2025? _____ (SSA)
5. Did you Receive Disability in 2025? _____
6. Did you Receive Interest Incpme in 2025? _____ (1099INT)
7. Did you Receive Dividends Income in 2025? _____ (1099DIV)
8. Did you Receive any type of lawsuit settlement in 2025? _____
9. Did you pull any money out of your retirement in 2025? _____ (1099R)
10. Did you win money from gaming (casino) establishment in 2025? _____ (W2G)
11. Were you, your spouse or child9ren0 in college in 2025? _____ (1098T or 1098E)
12. Are you purchasing your home? _____ If yes (1098) from your Mortgage Co.
13. Did your home foreclose in 2025? _____ (1099C or 1099A)
14. Did you do home efficient upgrade? _____
15. Did you receive forgiveness of any credit card? _____ (1099C)
16. Did you have insurance with the Market Place in 2025? _____ 1095A
17. Do you have a debt with the IRS? _____
18. Do you Owe back Child Support? _____
19. Do you have outstanding student loan? _____ If so, are you on a PMT plan? _____
20. Have you been denied EIC (Earned Income Credit) in a prior year? _____
21. Did you work overtime or received tips in 2025? _____ (form from employer)
22. Did you purchase a New Vehicle in 2025 for personal usage? _____
 - a. Model: _____
 - b. Date Purchased _____
 - c. VIN# _____



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23. Would you like to apply for **Fast Cash Advance** \$500.00 to \$7,000.00? _____ (**we can't guarantee you will qualify for this advance or how much**)
24. Would you like to apply for the **fast forward**? _____ (\$25.00 fee) Refund will be issued on the IRS releases your refund date.
25. Would you like your refund to be on a pre-paid card, check from my office (\$12.00 Fee) Direct Deposit?
 - a. Bank Name: _____
 - b. Routing Number _____
 - c. Account Number _____



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2025 SELF EMPLOYEMENT FORM

1. When did you start the business? _____
2. Do you have an EIN? _____ If yes provide number _____
3. Do you have a business license? _____ If Yes, Is it current? _____
4. Do you have a separate business bank account? _____
5. What type of service(s) do you provide? _____
6. Will you be preparing 1099's? _____
7. Did you keep records to show business income and expenses? _____
8. Did you purchase any large Equipment or Vehicle? _____

Business Income _____ Total Miles Traveled for Work Only _____

Business Expenses:

Supplies _____ Travel/meals/Ent _____ Legal/Prof Svs _____
Rent _____ Advertising _____ Internet _____
Postage _____ Office Exp _____ Phone: _____
Labor _____ Utilities _____ Permits/License _____
Gas _____ Repair & Main. _____ Insurance _____
Uniform _____ Bank Fees _____

By signing below, I certify that I am self-employed, and that the information given above is true and accurate to the best of my knowledge.

Taxpayer Signature: _____

Taxpayer Signature: _____



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www.springfieldtaxes.com

Letter Of Engagement

2025 Tax Year

The Undersign person(s) has authorized **Springfield Bookkeeping & Tax Services** representative(s) to prepare their federal/state(s) tax return(s). **Springfield Bookkeeping & Tax Services** claims no responsibilities for tax return(s) other than preparing the return(s), the accuracy of the return(s) will be related to the information that the taxpayer provided. Information received by **Springfield Bookkeeping & Tax Services** will be use in accordance with the rules and regulations of the Internal Revenue Services.

Springfield Bookkeeping & Tax Services makes no guarantee to the time frame of Tax refunds deposited. All dates are at best estimated times, but not guaranteed. Please allow 21 business days from the date the IRS Acknowledges your tax return before contracting my office or the IRS.

If payment is not electrically paid from your federal tax return(s) the taxpayer(s) is responsible for any unpaid balance, it is your responsibility to pay the preparation fee. This include if the IRS takes your refund. If using direct deposit and fees are not paid, **Springfield Bookkeeping & Tax Services** may use Auto Collect to collect past due preparation fees from your account.

By signing this letter of engagement to have your tax return(s) prepared, you have authorized **Springfield Bookkeeping & Tax Services** to prepare your tax return(s) and to fully offset the services rendered.

Taxpayer Signature: _____ Date: _____

Taxpayer Signature: _____ Date: _____



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2025 Tax Season Intake Form

Name: _____ SS# _____

Address: _____ City: _____ State: _____ Zip: _____

DOB: _____ Occupation: _____

Home Phone#: _____ Cell Phone# _____ Carrier: _____

Email-address: _____

Spouse Name: _____ SS# _____

DOB: _____ Occupation: _____

Cell Number: _____ Carrier: _____

Email-Address: _____

Dependents:

Name: _____ SS# _____

DOB: _____ Relationship: _____

Name: _____ SS# _____

DOB: _____ Relationship: _____

Name: _____ SS# _____

DOB: _____ Relationship: _____

1. Did your dependent(s) live with you in 2025? _____ How many months? _____
2. Are you claiming the same dependent(s) as last year? _____
3. If you claim your grandchild(ren) please provide the following info:
 - a. Parent(s) name: _____
 - b. Address: _____



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4. Did the parent(s) contribute to the care of the child(ren) _____
5. Do you have birth cert(s) and social security card(s) for the dependents? _____
6. Have you ever been denied the Earned Income Credit? _____ If yes when: _____
7. Did you pay for childcare services so that you could work? _____
8. What type of public assistant did you receive? Please circle all that applies: Food Stamps, Housing Assistant, Welfare, Child Care Assistant

By signing this form, you agree that all information provided is true according to the due delinquency form 8867 pertaining to the earned Income Credit Check List.

Taxpayer Signature: _____

Taxpayer Signature: _____