

2025 Tax Packet Intake Form

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Section 1: Personal Information

Filing Status: (chose one)

<input type="checkbox"/> Single	<input type="checkbox"/> Married Filing Separately
<input type="checkbox"/> Married Filing Jointly	<input type="checkbox"/> Head of Household

Address: _____

Phone Number(s): _____

Email: _____

Full Name as it appears on your Social Security Card:

_____ **Date of Birth:** _____

Social Security Number (SSN) or ITIN: _____

Spouse's Name as it appears on your Social Security Card:

_____ **Date of Birth:** _____

Social Security Number (SSN) or ITIN: _____

Taxpayers' Driver's License

DL Number _____

State Issued _____

Issue Date _____

Exp Date _____

Spouse's Driver's License

DL Number _____

State Issued _____

Issue Date _____

Exp Date _____

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Section 1A: Personal Information Dependents'

Dependents' Name as it appears on your Social Security Card

Date of Birth:

Social Security Number (SSN) or ITIN:

Dependents' Name as it appears on your Social Security Card

Date of Birth:

Social Security Number (SSN) or ITIN:

Dependents' Name as it appears on your Social Security Card

Date of Birth:

Social Security Number (SSN) or ITIN:

Section 1B: Banking Information

Checking

Savings

Name of Bank for Direct Deposit:

Bank Routing Number:

Bank Account Number:

Identity Protection PIN (if issued
by the IRS):

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Section 2: Income Documents

Please fill in all that apply and attach the corresponding forms:

Form	How Many	Form	How Many	Form	How Many
W-2	<hr/>	1099-DIV	<hr/>	1099-R	<hr/>
1099-NEC	<hr/>	1099-K	<hr/>	W-2 G	<hr/>
1099-INT	<hr/>	1099-G	<hr/>	SSA-1099	<hr/>
1099-B	<hr/>	Schedule K-1	<hr/>		

****To qualify for "no tax on tips" &/or "no tax on overtime" you must include your last paystub of 2025!***

Check below if you had
Cryptocurrency transaction records

****If you have other documents that are income-related or seem like they are income-related. Please provide them to your tax preparer.****

Section 3: Deductions and Credits

Please check all that apply and attach the corresponding forms:

<input type="checkbox"/> Mortgage interest (Form 1098)	<input type="checkbox"/> Student loan interest (Form 1098-E)
<input type="checkbox"/> Property tax records	<input type="checkbox"/> Childcare Statement
<input type="checkbox"/> Charitable contributions	<input type="checkbox"/> Educator expenses
<input type="checkbox"/> Medical or Dental expenses	<input type="checkbox"/> Energy-efficient home improvements
<input type="checkbox"/> Tuition (Form 1098-T)	<input type="checkbox"/> Cancellation of 1099-C Debt
<input type="checkbox"/> Retirement Plan Contributions	<input type="checkbox"/> HSA contributions (Form 1099-SA &/or 5498-SA)
	<input type="checkbox"/> Health insurance (Form 1095-A <i>only</i> . Forms 1095-B or C are not needed)

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Section 3: Deductions and Credits continued:

Estimated/Quarterly Tax Payments

Federal

Date	_____	Amount Paid	_____
Date	_____	Amount Paid	_____
Date	_____	Amount Paid	_____
Date	_____	Amount Paid	_____

State

Date	_____	Amount Paid	_____
Date	_____	Amount Paid	_____
Date	_____	Amount Paid	_____
Date	_____	Amount Paid	_____

Child Care Expense (Upload Document from Provider)

Child Care Provider	_____
Address	_____
Phone Number	_____
SSN or EIN	_____
Amount Paid	_____

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Section 4: Business Information

Business Name: _____

EIN: _____ Date Established: _____

Address: _____

Type of Business: _____

Provide End of Year Statement for each Platform

Please check all that apply and attach the corresponding forms:

<input type="checkbox"/> eBay	<input type="checkbox"/> Poshmark	<input type="checkbox"/> Mecari	<input type="checkbox"/> Depop
<input type="checkbox"/> Etsy	<input type="checkbox"/> Whatnot	<input type="checkbox"/> District	<input type="checkbox"/> Amazon
<input type="checkbox"/> Instacart	<input type="checkbox"/> DoorDash	<input type="checkbox"/> Uber	<input type="checkbox"/> Lyft
<input type="checkbox"/> Amazon Flex	<input type="checkbox"/> Other	_____	

Section 4A: Business Expenses (\$ Amount)

Office Supplies	_____	Shipping Supplies	_____
Platform Subscription	_____	Inventory Cost	_____
Bank Fees	_____	Commissions	_____
Cell Phone	_____	Storage Fee	_____
Shipping Fees	_____	Credit Card Interest	_____
Equipment	_____	Equipment Rental	_____
Education	_____	Labor	_____

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Section 4A: Business Expenses (\$ Amount) Continued

Advertising/Promotions/Branding

Platform Fees (includes listing & final value fees)

Professional Fees (accountant, bookkeeper, etc.)

Payment Processing Fees (PayPal, Venmo, CashApp)

Paid Apps/Software (\$ Amount)

Crosslisting App

Mileage App

Analytics App

Photo App

Inventory Lab

Inventory & Sales Tracking

Section 4B: Home Office Information

Requirements to Claim the Home Office Deduction

1. Regular and Exclusive Use.

Regular and exclusive use - used for office space, storage, prep for shipping, etc. It can be inside your home, your garage, or a separate structure on your property.

2. Principal Place of your Business

Principal place of your business - this is the main place you conduct your business; you may use other venues to meet clients, customers, etc, but the normal day-to-day operations happen here.

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Common Misconceptions About the Home Office Deduction

Despite the huge tax advantages, many individuals miss out on them due to misconceptions. Here are some common myths and their realities.

1. "Any Work from Home Qualifies"

Only the part of the property or the home that you use exclusively for business qualifies for the home office deduction. Also, this must be the principal place regularly used only for business purposes.

2. "It's a Red Flag for an Audit"

While this was true a few years ago, the IRS no longer considers it a red flag given the growing preference for self-employment. However, you must have the correct documentation to prove each deduction.

3. "Renters Can't Claim It"

Renters can also deduct these expenses, provided they meet the IRS requirements. Again, only the part used for business can be deducted.

If you meet the criteria for a Home-Based Business, you'll need to take measurements to determine how much you can deduct from your normal living expenses.

Total Square Feet of Your Home

Total Square Feet of Business Space

Section 4: Home Office Expenses (\$ Amount)

Rent

Mortgage Interest

Internet

Property Tax

Electricity

Water

Trash

Repairs/Maintenance

Propane/Natural Gas

Pest Control
