

2025 Tax Packet Intake Form

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Section 1: Personal Information

Filing Status: (choose one)

Single **Married Filing Separately**
 Married Filing Jointly **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	_____	1099-DIV	_____	1099-R	_____
1099-NEC	_____	1099-K	_____	W-2 G	_____
1099-INT	_____	1099-G	_____	SSA-1099	_____
1099-B	_____	Schedule K-1	_____		

***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 only. 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

State

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
<hr/>	<hr/>
Platform Subscription	Inventory Cost
<hr/>	<hr/>
Bank Fees	Commissions
<hr/>	<hr/>
Cell Phone	Storage Fee
<hr/>	<hr/>
Shipping Fees	Credit Card Interest
<hr/>	<hr/>
Equipment	Equipment Rental
<hr/>	<hr/>
Education	Labor
<hr/>	<hr/>

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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