

THE TAX LADIES, INC.  
4423B LEISURE TIME DRIVE  
DIAMONDHEAD MS 394525  
228-586-3352

COPY OF DRIVER'S LICENSE \_\_\_\_\_ TAX YEAR 2025 COPY OF PRIOR RETURN \_\_\_\_\_

TAXPAYER'S NAME \_\_\_\_\_ SPOUSE'S NAME \_\_\_\_\_

EMAIL \_\_\_\_\_ EMAIL \_\_\_\_\_

SOCIAL SECURITY# \_\_\_\_\_ SOCIAL SECURITY# \_\_\_\_\_

BIRTHDATE \_\_\_\_\_ BIRTHDATE \_\_\_\_\_

OCCUPATION \_\_\_\_\_ OCCUPATION \_\_\_\_\_

BLIND OR DISABLED \_\_\_\_\_ BLIND OR DISABLED \_\_\_\_\_

ST \_\_\_\_\_ DRIVER'S LICENSE# \_\_\_\_\_ ST \_\_\_\_\_ DRIVER'S LICENSE# \_\_\_\_\_

ISSUE DATE \_\_\_\_\_ ISSUE DATE \_\_\_\_\_

EXPIRATION DATE \_\_\_\_\_ EXPIRATION DATE \_\_\_\_\_

TELEPHONE# \_\_\_\_\_ TELEPHONE# \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

NUMBER OF DEPENDENTS \_\_\_\_\_ SEE DEPENDENT AND DUE DILIGENCE FORMS

WHAT WAS YOUR MARITAL STATUS AT THE END OF 2025?

\_\_\_\_\_ SINGLE

\_\_\_\_\_ HOH HEAD OF HOUSEHOLD

\_\_\_\_\_ MFJ LEGALLY MARRIED AND LIVED TOGETHER LAST 6 MONTHS OF 2025

\_\_\_\_\_ MFS LEGALLY MARRIED BUT NOT LIVING TOGETHER

\_\_\_\_\_ SPOUSE'S NAME \_\_\_\_\_ SS# \_\_\_\_\_

\_\_\_\_\_ WIDOWED, DATE OF SPOUSE'S DEATH \_\_\_\_\_

\_\_\_\_\_ ARE you a US citizen?

\_\_\_\_\_ DID you live in the US for at least 6 months of 2025?

\_\_\_\_\_ CAN anyone consider you as a dependent?

\_\_\_\_\_ TAX returns provided for prior years if new client?

\_\_\_\_\_ RECEIVED W-2, 1099NEC, 1099 MISC for wages and salaries?

\_\_\_\_\_ TIPS How much \_\_\_\_\_ Written record \_\_\_\_\_

\_\_\_\_\_ SOCIAL Security or Railroad Retirement, SSA 1099?

\_\_\_\_\_ PENSION or Retirement received 1099R

\_\_\_\_\_ INTEREST on savings or checking 1099-INT

\_\_\_\_\_ STOCK, bonds, mutual funds, dividends, 1099-DIV or 1099-B

\_\_\_\_\_ ROYALTIES, 1099-MIS

\_\_\_\_\_ OVERTIME—Documentation \_\_\_\_\_

☐ DID you contribute to an IRA, ROTH IRA OR SEP PLAN? Form 5498. how much \_\_\_\_\_  
☐ DID you receive a lump sum from an employee retirement sponsored plan 1099-R?  
☐ DID you rollover any amount of this distribution? Form 5498 how much \_\_\_\_\_  
☐ DID you receive a pension or IRA distribution and the recipient was under 59 ½?  
☐ DID you rollover any amount of this distribution for 5498? how much \_\_\_\_\_  
☐ DID anyone receive Unemployment Compensation 1099G  
☐ DID anyone receive alimony ? If so, date ordered \_\_\_\_\_ Paid to: \_\_\_\_\_ Amt \_\_\_\_\_  
☐ DID you have any gambling winnings W-2G (lottery, race track, casinos, raffles)?  
☐ ANY miscellaneous income 1099-MISC (prizes, awards, royalties, jury duty)?  
☐ DO you own any form of stablecoins or bitcoins? Did you buy or sell any in 2025?  
☐ ARE you self-employed and/or own a business?  
☐ DID you use a portion of your home exclusively for self-employment?  
☐ DO you rent land or property for agricultural purposes?  
☐ Do you own property that you lease to others?  
☐ Schedule K-1  
☐ Partnership or S Corp  
☐ Estate  
☐ Trust  
☐ Home mortgage Interest, 1098 If so, real estate property taxes amount \_\_\_\_\_  
☐ DID you sell or purchase a new home in 2025? Closing Statement attached? \_\_\_\_\_  
☐ DID you have any unreimbursed medical expenses? How much (documents) \_\_\_\_\_  
☐ DID you travel any miles for medical appointments? How many? \_\_\_\_\_  
☐ DID you have to pay for any part of your health insurance? How much \_\_\_\_\_  
☐ DID you make contributions to churches or charities? Do you have written proof? \_\_\_\_\_  
☐ HAVE you received any letters from the IRS in 2025?  
☐ DO you have a home mortgage/HELOC/Line of Credit used solely for home improvement?  
☐ DO you have any Capital Loss Carryover ?  
☐ DID you pay sales tax on large purchases in 2025 (car, boat, aircraft, motor home)  
☐ DID you or any dependent attend any educational classes?  
☐ DO have a 1098-T?  
☐ DID you pay student loan interest 1098-E?  
☐ DO you have documents for books, parking fees, or other educational expenses?  
☐ DID anyone in your family work in a school? In what capacity? How many hours in 2025?  
☐ DID you pay any household employee over \$2600?  
☐ DID you have any financial interest or signing authority over any foreign account?  
☐ DO you have health insurance?  
☐ DOES anyone in the family have MARKETPLACE insurance?  
☐ DID you purchase a new or used vehicle between 1/1/2025 and 9/30/2025?  
☐ DID you pay estimated income taxes on a quarterly basis during 2025? When and how much?  
☐ DO you want to donate \$3 to presidential fund?  
☐ DO you think you might get a tax refund for 2025? If yes. Bank Name \_\_\_\_\_  
☐ Routing# \_\_\_\_\_ Account Number \_\_\_\_\_ Checking or Savings \_\_\_\_\_  
☐ WOULD you like for us to efile your return?

DID YOU RECEIVE INCOME FROM ANY OTHER SOURCES THAT ARE NOT LISTED ON THESE TWO PAGES? \_\_\_\_\_ CAN YOU PROVIDE DOCUMENTATION IF REQUIRED? \_\_\_\_\_

SIGNATURE OF TAXPAYERS \_\_\_\_\_

DATE \_\_\_\_\_