

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 _____