Updated Client Information for 2025 Taxes

NO APPT___ OR APPT (DATE AND TIME)____________

Client Name(s) ______________________________ **Date** ____________

Names you and spouse go by (if different than above) _______________________

~Mailing Address _________________________**City**____________ **State**_____ **Zip**_________

~Physical address (if different than mailing) ____________________________

(County)____________**(School District)** _______________

****Best Person to Contact for Tax Purposes** ________________

Taxpayer Phone____________ **Spouse Phone**___________**(Home)**_______________

Email ___________________________**Spouse email** ________________________________

Occupation___________ **Spouses Occupation** ______________

~ <u>Does anyone have an IRS ID Protection Pin number?</u> Y____ N_____ (either by mail or online) Remember, A <u>new one is issued every January!</u>

<u>2026 IRS ID Protection PIN #</u> T__________ SP ___________Dependents_______________

~Any Major changes in 2025 **(marriage/divorce, # of dependents, college, bought house, retired, job change, turned 65... etc.) _________________________ (if married or divorced, did name change on SS Card? Will need a new license if so), (if moved to new state, need move date), (If new dependent, we need SS Card and Birthdate)**

~Has your bank account changed? Y___N___ (If yes, please provide info)

Routing # ____________ **Account #**_______________ **Bank Name**____________

(Cking or Savings)

*****IRS REFUNDS NORMALLY BY CHECK WILL BE ISSUED ON DEBIT CARDS**

~If You owe money to the IRS or NYS, how do you want to pay- Mail check or IRS Website?.

Walrath Tax Service

~~Has your Driver's license expired or changed (i.e....renewed, enhanced, lost...etc.?) If so, we need a copy of your Driver's License (FRONT AND BACK)

Income Checklist

~W2's (How Many? ____)
~1099R's (How Many? ____)
(RETIRNEMENT/PENSIONS/IRA WITHRAWS..ETC)
~1099s from interest, dividends
~Social Security **(Need 1099SA)**
~Unemployment statements **(Need 1099G)**
~Brokerage statements
(Robinhood, Fidelity, Schwab, etc)
(Need full statements- uploading them is appreciated)
~K-1 from partnerships, s corps, estates, and trusts
Self-employment Income and Expense
(Must be in categories and totaled)
~Rental income and expense
(Must be in categories, totaled & each rental separate)
~LOTTO/GAMBLING WINNINGS
~SOLD HOME OR PROPERTY
(Need HUD statement)
~OTHER INCOME
~Do you have any virtual currency? (Bought, sold, exchanged

Deductions/Credits (most common, not everyone can use all of these)

~Child Care **(need Provider Name, Address and SSN or EIN Number, & Amount by Child)**
~Student Loan Interest **(1098E)**
~Teacher expenses (Amount______)
~ College Information (personal or Dependent)
1098T, Books, dorm exp, college invoice
~529 plan-Education IRA Contribution / 1099Q
~Charitable Donations
(Total amount needed _______)
~Mortgage Int, Property and School Taxes
~Energy Credits- Windows, doors, insulations, furnace, hot water, solar..etc.. Go to our website for more information

Other Information

~HSA Information (Form 1099SA For withdrawals/ Form 5498 if self-Contribution)
~Estimates Paid For 2025
(will need Amounts and dates)
~Healthcare from the Marketplace
(Will need 1095A)
~Are you an Active Volunteer Fire fighter? (APPLYS TO NY ONLY)
~Did you put money into an IRA or Roth IRA

New for 2025 taxes

****Did you buy a new vehicle in 2025? (check website for qualifications or ask for our info sheet)**

****Did you receive overtime pay in 2025? If so, we need your last paystub (if the overtime is not on your W2.)**

****Did you receive tips as part of your employment? If so, you may be eligible for a tax deduction. (check website for qualifications or ask for our info sheet)**

****NY residents- did you receive an inflation reduction check in fall 2025?**
Amount received -- $150, $200, $300, $400

Dear Taxpayer(s),

This letter is to confirm our understanding of the terms of our agreement and outline the nature and extent of the services we will provide. **Based upon the information you furnish to us; we will prepare your Federal and applicable state income tax returns for 2025.**

We will not audit or verify the data you submit to us, although we may ask you for clarification when necessary. All the information you submit to us will, to the best of your knowledge, be correct and complete and include all other information necessary for the completion of your tax return.

We will also prepare 2026 estimated tax vouchers if required, based on your income and withholding taxes for 2025. **If you anticipate a substantial change in income or withholding taxes for 2026, please advise us as soon as possible.** We will then determine whether an adjustment should be made to your tax estimates.

Your returns are subject to review by the taxing authorities. Any items that may be resolved against you by the examining agent are subject to certain rights of appeal. In the event of an examination, we will be available upon request to represent you, or to review the results of any examination. Billing for these additional services will be at our standard rates. **We will charge a postage fee for any returns we have to mail. Any additional hard copies will be available for an additional fee.**

Our secure Tax portal is available as long as you are a client, we do suggest downloading and keeping a backup of your files.

The charges for our services are based on the complexity of the returns. I agree to pay my bill, in full at the time of service. Payment options are Cash, Check or Card.

You have the final responsibility for your income tax returns. Please review them carefully before you sign them for Efiling.

With my signature I am attesting that all information submitted to Walrath Tax Service is true, correct, and complete to the best of my knowledge.

If the above is in accordance with your understanding of the terms and conditions of our agreement, please sign and return a copy of this letter.

PLEASE SIGN: TAXPAYER________________________ DATE__________

SPOUSE________________________DATE__________