

# 2025 New Client Information Sheet-

Date \_\_\_\_\_

(Taxpayer) First Name \_\_\_\_\_ MI \_\_\_\_\_ Last \_\_\_\_\_ DOB \_\_\_\_\_ SS# \_\_\_\_\_

Name you go by \_\_\_\_\_

Spouse's Full Name \_\_\_\_\_ MI \_\_\_\_\_ Last \_\_\_\_\_ DOB \_\_\_\_\_ SS# \_\_\_\_\_

Name you go by \_\_\_\_\_

Mailing Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ (Own or Rent)

Physical address (if different from above) \_\_\_\_\_

COUNTY \_\_\_\_\_ School Dist \_\_\_\_\_

Cell Phone \_\_\_\_\_ Spouse's Cell \_\_\_\_\_ Home Phone \_\_\_\_\_

Email Address \_\_\_\_\_ Spouse email \_\_\_\_\_

## \*\*Best Person to Contact for Tax Purposes \_\_\_\_\_

Your Occupation \_\_\_\_\_ Spouses Occupation \_\_\_\_\_

Previous preparer \_\_\_\_\_

How Did you hear about us...? Internet/website \_\_\_\_\_ Relative Name \_\_\_\_\_ Drive by \_\_\_\_\_

Co Worker's name \_\_\_\_\_ Friend Name \_\_\_\_\_ Radio \_\_\_\_\_ Yellow Pages \_\_\_\_\_ Other \_\_\_\_\_

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

If you are due a refund, do you want Direct Deposit to your bank account? (need voided check or fill out info)

Bank Name \_\_\_\_\_ Routing # \_\_\_\_\_ Checking or Savings (Circle One)

Account # \_\_\_\_\_ (must be an account with the taxpayer's name, both if joint)

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

### Filing Status:

\_\_\_\_ Single ..... Can someone else Claim you? Y N Not Sure

\_\_\_\_ Married filing jointly \_\_\_\_\_ Married filing Separate (Spouse's name) \_\_\_\_\_ SS# \_\_\_\_\_

\_\_\_\_ Surviving Widow(er) (w/ dependent child) \_\_\_\_\_ Head of Household (unmarried/separated with dependents)

\_\_\_\_ Single student claimed by parents

**Dependents:** List children living with you age 18 or younger. (If child is age 19 through 23 and attends school full time for at least 5 months during the year, place an "s" after the name to denote student)

First Name	Mid Int	Last name	SS#	DOB	relationship	months live	any
				To taxpayer		in home 2025	college

**Other dependent:** (list mother, father, child not listed above, etc)

First Name	Mid Int	Last Name	Relationship	Age	S.S.#	Gross Income	#months
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## Copies of Driver's License required (Front & Back)

**Do you have an IRS ID Protection PIN #? We need each person that has one, including dependents (either by mail or online) (A new one is issued every January)**

Taxpayer Pin \_\_\_\_\_ Spouse pin \_\_\_\_\_ Dependents pin \_\_\_\_\_

### Events throughout the year (check if applies)

Change in number of dependents  Married/Divorced/Spouse died  You, spouse, or Dependent reached age 65

#### INCOME CHECKLIST

- ~W2's (How Many? \_\_\_\_\_)
- ~1099R's (How Many? \_\_\_\_\_)
- (RETIRNEMENT/PENSIONS/IRA WITHDRAWS..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 with a secure loan? (check website for qualifications or ask for our info sheet) If Qualified, we will need your interest paid in 2025.**

**\*\*Did you receive overtime pay in 2025? If so, we need your last paystub of 2025**

**\*\*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 provide to us; we will prepare your Federal and applicable state 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 Efilng.**

**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** \_\_\_\_\_