

Walrath Tax Service LLC -Updated information 2025

For Students (AGE 14-23)

Client Name _____ Date _____

Name you go by _____ Date of Birth _____

Mailing Address _____ City _____ State _____ Zip _____

Home Physical address (If Different from above) _____

(County) _____ (School District) _____

Phone # _____ Best Email address to use _____

~Are you being claimed, by parent or guardian? _____

~Were you in high school in 2025? _____ (if so, did you take College courses)

~Were you in college in 2025? _____ (if so, How many Months)

~Did you receive money from a 529 Plan for college?

~Do you have a 2026 IRS IP PIN Number? _____ (either in the mail or online)

~If you get a refund and want Direct Deposit, we will need, unless we already have it:

Bank Name _____ Routing # _____ Account # _____ Cking or savings

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

If you owe money, do you want to do Pay online or Mail Check

~Do you have a Driver's License/ Permit? _____ If so, we need a copy front and back, if we don't have a current copy on file.

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 (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)

Income Checklist

- ~W2's (How Many?)
- ~1099R's (How Many?)
- (RETIRNEMENT/PENSIONS/IRA WITHDRAWS..)**
- ~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)
- ~LOTTO/GAMBLING Winnings
- ~Do you have any virtual currency? (Bought, sold, exchanged)
- ~OTHER INCOME

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

- ~Student Loan Interest (**1098E**)
- ~Teacher expenses (Amount)
- ~ College Information (personal or Dependent)
1098T, Books, dorm exp, college invoice
- ~Charitable Donations
(Total amount needed)

Other Information

- ~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

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.

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 _____