

Name: _____

Best Phone #: _____ (Home) OR (Cell) _____

Email Address: _____

Did you move at any time during the year?

Yes No

If yes, please provide date(s): _____

If yes, new mailing address: _____

Did you marry during the tax year?

Yes No

If yes, Spouse's name, birthday, ss#? _____

Did you divorce during the tax year?

Yes No

If yes, date? _____

Did you have dependent change during the year?

Yes No

Explain: _____

If yes, name, birthday, ss#? _____

Did spouse/dependent pass away during year?

Yes No

If yes, please provide our office a copy of death certificate and short certificate if applicable

Are you 65 years old as of December 31, 2025?

Yes No

If yes, we need letter of annual rents paid from your landlord or paid property tax receipts. Pennsylvania has an expanded rebate program.

Did any of your children graduate high school during year?

Yes No

Note: If in college or trade school, we need copy of Form 1098-T

Did any of your children graduate college during year?

Yes No

What was date of graduation?

Note: If in college or trade school, we need copy of Form 1098-T

Would you like to e-file or mail your return?

Please select only 1 option (if both, EFILE is default option)

EFILE

MAIL

If you have a refund, do you desire it to be direct deposited?

YesDD

NoDD (mail)

Note: Voided check (not deposit slip - if not on file) when your information is dropped off

SEE NEXT PAGE

**Would you like to receive a secure, free electronic return copy
(you can print your own copy from the electronic copy
provided) *OR* a paper copy**

E-Copy

PAPER

Note E-Copy: Will generally reduce processing time by average of 5 business days.

Note E-Copy: We need your email address

SELECT ONLY 1 Option above

**Did you make 2025 Federal Estimated 1040ES Tax Payments?
(NOT withholding on W2 or 1099)**

Yes

No

**Did you make 2025 State Estimated Tax Payments?
(NOT withholding on W2 or 1099)**

Yes

No

**Did you make 2025 Local Estimated Tax Payments?
(NOT withholding on W2 or 1099)**

Yes

No

Note: We will need dates and amounts paid for each one you paid personally noted above

Did you have healthcare via Exchange (Obamacare)?

Yes

No

Note: We will need copy of Form 1095 (Form 1095-A is required) or IRS will reject return

**Did you receive Form 1099-K (personal cash received
payments)?**

Yes

No

Note: Please provide copy to our office

Did you invest in any crypto currency during year (Bitcoin etc)?

Yes

No

Note: We will need information on any sales or exchanges made

Did you make charitable contributions during year?

Yes

No

If yes, please provide us the total paid

Did you have overtime pay/income during year?

Yes

No

If yes, please provide us the total paid

Did you have tip income during year?

Yes

No

If yes, please provide us the total paid

Did you have vehicle loan interest paid during the year?

Yes

No

If yes, please provide us the total paid

Are you providing all your tax documents currently?

Yes

No

Note: Please indicate what information (documents) are missing (please inform us when we have all to process returns)

Helpful Comments/Notes on above:

I have read the letter supplied and above
information is true and correct (returns cannot be
processed until this document is received)

Signature:

Date: