



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

We 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? Note: If in college or trade school, we need copy of Form 1098-T	Yes	No
---	-----	----

Did any of your children graduate college during year? What was date of graduation? Note: If in college or trade school, we need copy of Form 1098-T	Yes	No
---	-----	----

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

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) <i>OR</i> a paper copy	E-Copy	PAPER
Note E-Copy: Will generally reduces 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)? Note: We will need copy of Form 1095 (Form 1095-A is required) or IRS will reject return	Yes	No
Did you receive Form 1099-K (personal cash received payments)? Note: Please provide copy to our office	Yes	No
Did you invest in any crypto currency during year (Bitcoin etc)? Note: We will need information on any sales or exchanges made	Yes	No
Did you make charitable contributions during year? If yes, please provide us the total paid	Yes	No
Did you have overtime pay/income during year? If yes, please provide us the total paid	Yes	No
Did you have tip income during year? If yes, please provide us the total paid	Yes	No
Did you have vehicle loan interest paid during the year? If yes, please provide us the total paid	Yes	No

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:	<div style="text-align: center; margin-top: 20px;"> <p>I have read the letter supplied and above information is true and correct (returns cannot be processed until this document is received)</p> <p>Signature:</p> <p>Date:</p> </div>
----------------------------------	--