



NEW CLIENT WORKSHEET

I will need the following information to complete your 2025 tax returns. If the situation doesn't apply to you, then skip that request(s).

1. Last Tax Return (2024); both Federal and State.
2. Your address: _____
3. Your occupational title: _____ Spouse's: _____
4. Driver's License Information:
Your Driver's License Number: _____
Date of Issue: _____
Expiration Date: _____
Birthdate: _____
Spouse's Driver's License Number: _____
Date of Issue: _____
Expiration Date: _____
Birthdate: _____
5. Email Address:
Your Email Address: _____
Spouse's Email Address: _____
5. Cell Phone Number:
Your Cell Phone #: _____
Spouse's Cell Phone #: _____
6. Bank Account Information:
Bank Name: _____ Checking or Savings _____
Routing Number: _____
Account Number: _____
7. If you have dependents, please complete the following. Complete with information as it appears on the social security card:

Name: _____ SSN: _____ DOB: _____

Name: _____ SSN: _____ DOB: _____

Name: _____ SSN: _____ DOB: _____

Name: _____ SSN: _____ DOB: _____

Name: _____ SSN: _____ DOB: _____

Name: _____ SSN: _____ DOB: _____

8. Forms of income (Not all will apply):

- **W2:** Wage and Tax Statement (MOST COMMON).
- **1099-R:** Distribution from Pensions, Annuities or Profit-Sharing Plans, IRAs, Insurance contracts, etc.
- **1099-DIV:** Dividend income
- **1099-G:** Certain government payments.
- **1099-INT:** Interest income.
- **1099-K:** Payment Card and Third-Party Network Transactions.
- **1099-NEC:** Nonemployee compensation.
- **1099-MISC:** Miscellaneous information.
- **1099-B:** Proceeds from broker and barter exchange transactions
- **1099-S:** Proceeds from real estate transactions
- **1099-C:** Cancellation of Debt.
- **W2G:** Certain Gambling Winnings.

- 9.** If you have bank interest, then go to your online bank account and download a **1099-INT, Interest Income**. There will also be a **1099-INT** form for clients who have a home mortgage. Please go to your online mortgage account and download the **1099-INT**. These are often overlooked by tax clients and may result in a letter from the IRS indicating interest was not accounted for on your tax return.
- 10.** If you SOLD stock(s), sold cryptocurrency or received dividends, then you go to your online brokerage account(s) and download a **1099-B, Proceeds from Broker and Barter Exchange Transactions**. Each brokerage account will have a separate 1099-B.
- 11.** If you cancelled debt with a credit card company or loan company, then they would have issued you a **1099-C: Cancellation of Debt**. This would have been sent in the mail or can be retrieved from your online credit card account.
- 12.** If you gambled and won a certain dollar amount (depending on the game), then the casino or lottery will issue a **W2G** for your winnings if they exceed a certain dollar amount.

- 13.** If you received income from retirement accounts, I will need your **1099-R: Distribution from Pensions, Annuities or Profit-Sharing Plans, IRAs, Insurance contracts, etc.**
- 14.** If you or any of your dependents attended college in 2025, you may qualify for an education credit. This depends on your income and a few other factors. I will need a **1099-T: Tuition Statement** from the college, which can be downloaded from the student's online account. BEFORE you spend time looking for this form, which can take time, discuss the education credit with me to see if you qualify.
- 15.** If you or any of your dependents paid student loan interest in 2025, I will need a **1098-E: Student Loan Interest Statement**. Not all taxpayers will qualify for this credit, but I won't know until I prepare your tax return.
- 16.** Proof of Health Care Coverage which can be a **1095-A, 1095-B** and/or **1095-C**. If your company or department paid for your health insurance for all of 2025, then you will **NOT** have to send this form to me, which is often delayed and received several weeks after the opening day of the tax filing season. ***If you bought your own insurance through the marketplace (aka Obamacare), then I will not be able to complete your tax returns until you send me your 1095s.

FOR THOSE WHO ITEMIZE DEDUCTIONS – Tax clients who do not itemize deductions can skip to question 21

- 17.** If you own a home or other real estate, I will need your **1098 Mortgage Interest Statement(s)**. Sometimes there may be more than one, especially if you refinanced or your bank sold your loan to another company. You can retrieve these forms from your online accounts associated with your loan or loans. Please check to make sure you are sending all of them if there is more than one.
- 18.** If you do not impound property tax for your real estate, I will need statements indicating the amount of property tax that you paid for your home or other real estate.
- 19.** Cash Donations. Please complete the following lines:

Name of Organization: _____

Dollar Amount: _____

Name of Organization: _____

Dollar Amount: _____

Name of Organization: _____

Dollar Amount: _____

Name of Organization: _____

Dollar Amount: _____

Name of Organization: _____

Dollar Amount: _____

20. If you made NON-CASH Donations, please discuss them with me.

21. Registration Fee Statements for all motor vehicles in your household. If you don't have the statements, then provide the license plate number and last five digits of the VIN below:

License Plate # _____	Last FIVE of the VIN _____
License Plate # _____	Last FIVE of the VIN _____
License Plate # _____	Last FIVE of the VIN _____
License Plate # _____	Last FIVE of the VIN _____
License Plate # _____	Last FIVE of the VIN _____

22. Last Year (2024) Tax Preparation Fee paid: _____

23. If you spent a large amount of money for medical expenses in 2025, please discuss them with me to see if they are deductible. Often, they are not, which I will explain.

ADDITIONAL CREDITS FOR ALL TAX CLIENTS

24. If you paid alimony in 2025, discuss it with me to determine if it's deductible.

25. If you purchased an electric car in 2025, then you **may** qualify for the **Electric Vehicle Tax Credit**. Discuss with me.

26. If you invested in renewable energy for your home such as solar, wind, geothermal, fuel cells or battery storage technology, you may qualify for an annual **Residential Clean Energy Tax Credit**. Discuss with me.

27. If you made qualified energy-efficient improvements to your home after Jan. 1, 2025, you may qualify for the **Energy Efficient Home Improvement Credit**. Discuss with me.

28. If you paid child or dependent care expenses in 2025, then complete all the following:

Dependent's Name: _____

Name of Provider: _____

Address of Provider: _____

Phone Number of Provider: _____

Social Security Number or Employer ID of Provider: _____
Amount Paid: _____

Dependent's Name: _____

Name of Provider: _____

Address of Provider: _____

Phone Number of Provider: _____

Social Security Number or Employer ID of Provider: _____

Amount Paid: _____

Dependent's Name: _____

Name of Provider: _____

Address of Provider: _____

Phone Number of Provider: _____

Social Security Number or Employer ID of Provider: _____

Amount Paid: _____

Dependent's Name: _____

Name of Provider: _____

Address of Provider: _____

Phone Number of Provider: _____

Social Security Number or Employer ID of Provider: _____

Amount Paid:

NOTES:

(or IF YOU RAN OUT OF ROOM ANSWERING ANY OF THE QUESTIONS ABOVE)

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. The paper has a slight shadow on its right side, suggesting it's resting on a surface.