

2025



Status:	Single ____ (not married)	Married ____	Separated ____ (living apart)	Head of Household ____ ↗ (means supporting children in your home)	Widow(er) ____
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***ATTN: WE ONLY NEED SS #'s and BDATES IF YOU ARE A NEW CLIENT OR HAVE A NEW DEPENDENT**

Taxpayer Name:	Spouse Name:
*SSN:	*SSN:
*B-Date:	*B-Date:
Occupation:	Occupation:
Mailing Address:	
Best Phone# to reach you:	
Email address:	
<i>You may either provide a copy of your Driver's License or fill in the information below:</i>	
Taxpayers DL#:	Spouses DL#:
State:	State:
Issue date:	Issue date:
Expiration:	Expiration:

Dependents

Full Name:	Full Name:
Relationship	Relationship:
School attended:	School attended
# months lived in your home in 2025:	#months lived in your home in 2025:
<i>If you are a NEW client we need birthdate and SS number for dependents</i>	
*B-Date:	*B-Date:
*Social:	*Social:

Full Name:	Full Name:
Relationship	Relationship
School attended:	School attended:
# months lived in your home in 2025:	#months lived in your home in 2025:
<i>If you are a NEW client we need birthdate and SS number for dependents</i>	
*B-Date:	*B-Date:
*Social:	*Social:
Is there a possibility another person could Qualify to claim your child/children? Yes No	

All REFUNDS are Direct Deposit Per IRS ORDER 14247:They will NOT mail refunds

Bank Name:	Account #:
Routing #:	Checking or Savings?
Please provide printed documentation to avoid errors. Once transmitted this cannot be fixed!	

Would you like to have your tax prep fees withheld from you refund? YES NO
(EPS Financial & Drake Software charge an additional fee)

If YES, we need your mother's maiden name (used for security question): _____

Also need **unexpired** copy of (both) driver license for this service.

Please Answer Questions on Reverse Side. Sign and Date.

2025

Please check Yes or No to all the following Questions

YES	NO	
		Were you widowed, married, divorced or separated this past year? If yes, give date. _____
		Did any of your dependents graduate from high school or college in 2025? If yes you can possibly still claim as a dependent.
		Did you pay Day Care expenses? To whom and amount: _____
		Have you even been disallowed Earned Income Credit or the Child Tax Credit?
		Is anyone on your return currently in their first 4 years of college? If yes, possible Credit available need students 1098T. Did student get military assistance?
		Did you earn interest or dividends on checking or savings accounts? If yes, attach 1099(s).
		Did you contribute money to Smart529 or any other WV Prepaid Tuition Plan?
		Did you make any withdrawals from an IRA or 401k? Do you have the 1099 for that transaction?
		Did you or your spouse contribute to a Traditional IRA Acct or a Roth? (not 401k)
		Did you "roll over" a retirement plan into another plan? Do you have the 1099?
		Did you receive a Schedule K-1 from a partnership, S Corporation, or Trust? If so, please attach.
		Did you or your spouse receive any Social Security Benefits in 2025?
		Did you receive any type of prize, award or gambling winnings? Attach W2G's
		Did you receive any Unemployment in 2025? Enclose Form 1099G from state.
		Did you receive or pay alimony established in a divorce decree prior to 12/31/2018? Amount Paid or Received \$_____ To whom & SSN: _____
		Do you have any Investment Accounts? If yes, have you received your 1099 consolidated statement
		If applicable, have you enclosed your 1095A from Healthcare.gov? (Obamacare)
		Do you want to set up a Children's IRA (Trump Account) for any child under age 18? 2025 babies will receive \$1000 from the US Treasury. Other children you must fund yourself.
		Did you work Overtime or receive Tips in 2025? If not on W2 in Box 14 will need last pay stub.
		Did you purchase on a new U. S. assembled vehicle in 2025? If so, will need VIN, loan origination date, loan balance on 12/31 and interest paid in 2025
		Please write dates and amounts of any estimated tax payments for 2025? Federal Date/Amount: _____ State Date/Amount: _____ Federal Date/Amount: _____ State Date/Amount: _____ Federal Date/Amount: _____ State Date/Amount: _____ Federal Date/Amount: _____ State Date/Amount: _____

Signature

Date

Do you request a specific preparer? NO YES

Wendy Cindy Jeane Carly Marilyn Jennifer Christi Clarissa(CJ)