

2025



|   |                                  |  |  |  |
|---|----------------------------------|--|--|--|
| Status: Single <input type="checkbox"/> | Married <input type="checkbox"/> | Separated <input type="checkbox"/><br>(living apart) | Head of Household <input type="checkbox"/> | Widow(er) <input type="checkbox"/><br>↗ (means supporting children in your home) |
|---|----------------------------------|--|--|--|

\*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 your 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 <b>withdrawals</b> from an IRA or 401k? Do you have the 1099 for that transaction?  |
|  | Did you or your spouse <b>contribute</b> 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?<br>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?<br>Federal Date/Amount: _____ State Date/Amount: _____<br>Federal Date/Amount: _____ State Date/Amount: _____<br>Federal Date/Amount: _____ State Date/Amount: _____<br>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)