

DATE _____

2025 TAX INFORMATION

IF YOU ARE A NEW CLIENT WE WILL NEED A COPY OF THE FOLLOWING DOCUMENTS FOR YOU AND ANYONE LISTED ON YOUR TAX RETURN:

- **DRIVERS LICENSE**
- **SOCIAL SECURITY CARD**
- **LAST YEAR TAX RETURN FILED**

*PER THE IRS , THE ABOVE DOCUMENTS HAVE TO BE IN OUR OFFICE FOR OUR DUE DILIGENCE

CLIENT INFORMATION

NAME:

ADDRESS:

PHONE: ()

EMAIL ADDRESS:

SCHOOL DISTRICT:

ACTIVE MILITARY YES NO

ARE YOU A DISABLED VETERAN? YES NO

FILING AS: MARRIED SINGLE MARRIED FILING SEPERATELY

IF YOU ARE CLAIMING DEPENDENTS - WE NEED PROOF OF RESIDENCY FOR THE TAX YEAR

(DOCUMENT SHOWING DEPENDENT'S NAME & MATCHING ADDRESS OF TAXPAYER & TAX YEAR)

EXAMPLES: SCHOOL RECORD, DAYCARE RECORD, PHYSICIAN'S BILL, ECT.

NAMES AND BIRTHDATES OF DEPENDENTS ON YOUR TAX RETURN:

1. _____ / _____ / _____

2. _____ / _____ / _____

3. _____ / _____ / _____

4. _____ / _____ / _____

5. _____ / _____ / _____

6. _____ / _____ / _____

HEALTH INSURANCE

IF YOU PURCHASED YOUR HEALTH INSURANCE THROUGH **THE MARKETPLACE** PLEASE PROVIDE **FORM 1095A**.
 IF YOU HAVE NOT RECEIVED THIS FORM, PLEASE LOGIN TO YOUR ACCOUNT ON (www.healthcare.gov) TO ACCESS FORM 1095A.

CRYPTOCURRENCY

AT ANY TIME DURING 2025, DID YOU:

1. RECEIVE (AS A REWARD, AWARD, OR PAYMENT FOR PROPERTY OR SERVICES)
2. SELL, EXCHANGE, OR OTHERWISE DISPOSE OF A DIGITAL ASSET (OR A FINANCIAL INTEREST IN A DIGITAL ASSET)? **YES NO** **IF YES, WE WILL NEED THE 1099 FOR 2025*

DATE _____

2025 QUARTERLY ESTIMATE PAYMENTS

DID YOU PAY ANY ESTIMATE PAYMENTS? YES NO

IF YES, BRING DOCUMENTATION OR PROVIDE DATE & AMOUNT BELOW:

1. _____/_____/_____	\$ _____._____
2. _____/_____/_____	\$ _____._____
3. _____/_____/_____	\$ _____._____
4. _____/_____/_____	\$ _____._____

ALL REFUNDS ARE NOW DIRECT DEPOSIT PER THE IRS

PROVIDE YOUR BANK INFORMATION BELOW:

BANK NAME:

ROUTING NUMBER:

ACCOUNT NUMBER:

ACCOUNT TYPE: CHECKING SAVINGS

CLIENT COPY – 2025 TAX RETURN

***WE ARE GOING PAPERLESS**

TO KEEP OUR PRICES FROM INCREASING FOR OUR CLIENTS, WE WILL BE UTILIZING OUR CLIENT PORTAL FOR ALL DOCUMENTS; INCLUDING YOUR TAX RETURN. PLEASE PROVIDE A CURRENT EMAIL ADDRESS FOR US TO HAVE ON FILE TO ENSURE YOU HAVE ACCESS TO YOUR DOCUMENTS FREE OF CHARGE.

WHEN YOUR TAX RETURN IS COMPLETE, HOW WOULD YOU LIKE TO RECEIVE YOUR TAX RETURN?

- CLIENT PORTAL
- OFFICE PICKUP (\$50 Paper Copy Fee)
- MAIL (\$50 plus Postage Fee)

DATE _____

2025 AVAILABLE CREDIT AND DEDUCTION CHECKLIST

HOMESTEAD PROPERTY TAX CREDIT

DO YOU OWN YOUR PRINCIPAL RESIDENCE? YES NO

IF YES, WE WILL NEED SUMMER & WINTER PROPERTY TAX STATEMENTS
(NO MATTER WHEN YOU PAID THEM)

RENT CREDIT

DO YOU PAY RENT? YES NO

IS WATER, HEAT, AND/OR PET FEE INCLUDED IN YOUR RENT? YES NO

IF YES, PROVIDE INFORMATION BELOW:

RENT IS PAID TO:

Name: _____

MONTHLY RENT AMOUNT: \$ _____.

Address: _____

YEARLY RENT AMOUNT: \$ _____.

HOME HEATING CREDIT

WHO IS YOUR HEAT PROVIDER? _____

TYPE OF HEAT - PLEASE CIRCLE: PROPANE / NATURAL GAS / OTHER

ENERGY CREDIT

1. HAVE YOU MADE ANY QUALIFIED ENERGY EFFICIENT IMPROVEMENTS TO YOUR HOME? (E.G., EXTERIOR DOORS, WINDOWS, SKYLIGHTS, INSULATION, AIR SEALING MATERIALS)
YES NO
2. HAVE YOU MADE ANY RESIDENTIAL ENERGY PROPERTY EXPENDITURES? (E.G., CERTAIN HVAC, WATER HEATERS, HEAT PUMPS, PANELBOARDS)
YES NO

PERSONAL CAR LOAN INTEREST DEDUCTION

1. IS YOUR VEHICLE NEW, FINANCED & YOU ARE THE FIRST OWNER?
YES NO
2. WAS YOUR VEHICLE ASSEMBLED IN THE U.S.A?
YES NO
3. DOES YOUR VEHICLE'S WEIGHT UNDER 14,000lbs?
YES NO

*FOR INTEREST PAID ON THE VEHICLE, **FORM 1098-VLI** IS NEEDED. (YOU WILL HAVE RECEIVED THIS FORM BY 01/31/26)

DATE _____

IS THERE ANY ADDITIONAL INFORMATION WE SHOULD KNOW ABOUT YOUR TAX SITUATION?