

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 YOU 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)

[illegible]