

New Client Information Sheet 2025

Taxpayer Information: Names as printed on Social Security Card

Taxpayer Name: _____ D.O.B: _____ D.O.D: _____

SS#: _____ (New Clients Provide Copy) _____ Drivers License (Provide Copy) _____

Occupation: _____ Do you get paid Over Time? _____

Did taxpayer have health insurance from Healthcare.gov Marketplace in 2025? Yes or No

Do you own any Bitcoin or other Crypto currencies? Yes or No

Spouse Name: _____ D.O.B: _____ D.O.D _____

SS#: _____ (New Clients Provide Copy) _____ Drivers License (Provide Copy) _____

Occupation: _____ Do you get paid Over Time? _____

Did Spouse have Health Insurance from Healthcare.gov Marketplace in 2025? Yes or No

Do you own any Bitcoin or other Crypto currencies? Yes or No

Taxpayer Contact Information: List CURRENT address at time of filing.

Street _____ Apt # _____ P.O. BOX _____

City _____ State _____ ZIP _____

Phone # _____ E-mail (required for 2025): _____

County of Residence _____ School District Name _____

Important Notes/Changes from Last Year? (i.e. started own business, closed a business, new job, marriage, divorce,etc.)

Signature: _____ Date: _____

Dependent Information Sheet

Dependents: Only list dependents to be claimed on 2025 tax return include children born in 2025

Dependent #1: _____ Date of Birth: _____ SS#: _____

Relationship to Taxpayer: _____

Months Lived Taxpayer/Spouse House During 2025: _____

Was Dependent #1 College Student During 2025: Yes or No

Dependent #2: _____ Date of Birth: _____ SS#: _____

Relationship to Taxpayer: _____

Months Lived Taxpayer/Spouse House During 2025: _____

Was Dependent #2 College Student During 2025: Yes or No

Dependent #3: _____ Date of Birth: _____ SS#: _____

Relationship to Taxpayer: _____

Months Lived Taxpayer/Spouse House During 2025: _____

Was Dependent #3 College Student During 2025: Yes or No

Dependent #5: _____ Date of Birth: _____ SS#: _____

Relationship to Taxpayer: _____

Months Lived Taxpayer/Spouse House During 2025: _____

Was Dependent #5 College Student During 2025: Yes or No

For Additional Dependents Please Request an Additional Sheet

List Children Claimed in 2024 that will not be claimed in 2025: _____
