



**New?** We need last year's taxes if so.  
*Need DOB's and SSNs for everyone on return.*

(OFFICE) Date Received: \_\_\_\_\_

## TY25 DROP-OFF REQUIREMENTS

➡ TAXPAYER NAME: \_\_\_\_\_ Occupation: \_\_\_\_\_

SPOUSE NAME: \_\_\_\_\_ Occupation: \_\_\_\_\_

Preferred Contact for ?s : Person \_\_\_\_\_ Phone: \_\_\_\_\_ Text: Y N

Taxpayer Email: \_\_\_\_\_ \*required for eSignature

Spouse Email: \_\_\_\_\_ \*required for eSignature

\*Email will be used to send Secure Link for Following Season

**HOW DO YOU WANT YOUR FINISHED RETURN?** *One type is included. Both is \$10 fee.*  
PRINTED COPY/Sign by hand \_\_\_\_\_  
ELECTRONIC COPY/eSignature \_\_\_\_\_

➡ Taxpayer Driver's License: \_\_\_\_\_ State: \_\_\_\_\_ Issued: \_\_\_\_\_ Exp: \_\_\_\_\_ DOB: \_\_\_\_\_

Spouse Driver's License: \_\_\_\_\_ State: \_\_\_\_\_ Issued: \_\_\_\_\_ Exp: \_\_\_\_\_ DOB: \_\_\_\_\_

➡ Current Address: \_\_\_\_\_

➡ Did you buy, sell or exchange any virtual currency(Cryptocurrency)? Yes or No

➡ Did you have OVERTIME PAY in 2025? Yes or No Do you have proof for us if so? Yes or No

➡ Did you buy a BRAND NEW vehicle in 2025? *We want interest paid!*

**Did you want any refund(s) direct deposited? Y or N**

Same bank as Last year? Y or N BANK NAME PLEASE

CHECKING ACCT \_\_\_\_\_ SAVINGS ACCT \_\_\_\_\_

Routing #: \_\_\_\_\_

➡ Acct #:

**Did you have Marketplace Health Insurance?** \_\_\_\_\_

**We need your 1095-A(s)** \*You will get a 1095-A form, per policy you paid for separately, during the year. They are mailed as well as sitting in your Login for Acct.

**Are you over 65 and pay for Medical Premiums out of pocket?**

*Health, LTC, Supplemental Plans, Dental, Vision are all deductible on Iowa.*

### **Home Energy Improvements:**

\*Will Need \$\$ paid and maybe more info\*

➡ Ext. Doors \_\_\_\_\_ Electric Vehicle \_\_\_\_\_

Ext. Windows \_\_\_\_\_ Solar \_\_\_\_\_

Geothermal \_\_\_\_\_ Water Heater \_\_\_\_\_

Furnace \_\_\_\_\_ Energy Audit \_\_\_\_\_

Insulation Material \_\_\_\_\_

➡ If you owe Iowa, would you like us to setup an automatic withdrawal on **April 30<sup>th</sup>, 2026** (Due date), for that amount from your given bank account? **Yes or No**

### **Pay Later with Quick Collect Option?**

For a fee, Want us to pull our fee from your refund? Initials please

\$15 fee for Quick Collect on top of your standard prep fees. Drivers License/ID Required per spouse.

PREPARE

1<sup>ST</sup> AVAILABLE \_\_\_\_\_

ANDI \_\_\_\_\_

JACI \_\_\_\_\_

### **Do you own a home?**

**Can you get this above \$15,750 per Taxpayer/Spouse?**

Do we have your Mortgage Interest? (Form 1098) \_\_\_\_\_

Prop Taxes Paid in 2025? (May be on Form 1098) \_\_\_\_\_

Vehicle Registrations for 2025? \_\_\_\_\_

Make & Models: \_\_\_\_\_

Cash Donations? (Red Kettle, GS, BS) \_\_\_\_\_

Property Donations? (Goodwill) \_\_\_\_\_

**Have Lottery Winnings?** \_\_\_\_\_ *Do we have your losses?* \_\_\_\_\_

**Got kids?! →**

If you share children with someone else, please bring us your court paperwork to make a copy for your file.

## Clients with Children



**Affordable Accounting**

Please list all dependent children (in full-time school under age 23) being claimed on this year's return:

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_  
5. \_\_\_\_\_ 6. \_\_\_\_\_ 7. \_\_\_\_\_ 8. \_\_\_\_\_

Did you add or subtract any children on this year's return?

Who? : \_\_\_\_\_

Why?: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### New Children? New Dependent(s)?

Name

DOB

SSN

A. \_\_\_\_\_

\_\_\_\_/\_\_\_\_/\_\_\_\_

\_\_\_\_-\_\_\_\_-\_\_\_\_

B. \_\_\_\_\_

\_\_\_\_/\_\_\_\_/\_\_\_\_

\_\_\_\_-\_\_\_\_-\_\_\_\_

C. \_\_\_\_\_

\_\_\_\_/\_\_\_\_/\_\_\_\_

\_\_\_\_-\_\_\_\_-\_\_\_\_



Are you Claiming a Child or Children whom DOES NOT LIVE WITH YOU **MORE THAN** 50%?

Do we have a current 8332 from the custodial parent on file? **Yes No**

(Form 8332 is **required** when claiming a child whom does not live with you, the majority of the year.)

\*Ask if you need one to take with you to have the custodial parent fill it out.

If in K-12th grades: Cost of School Registration (per child)? 1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_

Cost of School Supplies (per child)? Not clothes/shoes..... 1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_

Extra School Fees or Dance ticket costs (per child)? ..... 1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_

Band Fees/Required Band Expenses (per child) ..... 1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_

Did you put into an IOWA 529 Plan? 1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_

Spouse put into an IOWA 529 Plan? 1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_ 4. \_\_\_\_\_

Daycare/Preschool? Did you include the Daycare/Preschool information?

Name, Address, SSN or EIN of Provider + total(s) paid per child.

**COLLEGE?** Your College Child did or will receive a 1098 Form that we need. Plus, their book costs and special tools or materials for classes. No laptops/printers.

NOTES to

PREPARER: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_