



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? NO or YES → *Year-to-Date 2025 Paystub REQUIRED

➡ 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 BRAND/MODEL #)**

➡ 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 30th, 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

1ST 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: _____

