

## TAX PREPARATION CLIENT DATA SHEET AND CHECKLIST

<b>Taxpayer 1:</b> Legal Name _____ Occupation _____ IRS IP PIN _____ SSN _____ Birthdate _____ Phone _____ OK to Text? <input type="checkbox"/> E-Mail _____ Dependent of Another <input type="checkbox"/> Give \$3 to Presidential Fund <input type="checkbox"/> Active-Duty Military <input type="checkbox"/> US Citizen <input type="checkbox"/> US Permanent Resident <input type="checkbox"/> Current Mailing Address: _____	<b>Taxpayer 2:</b> <small>(if Married and Filing Jointly)</small> Legal Name _____ Occupation _____ IRS IP PIN _____ SSN _____ Birthdate _____ Phone _____ OK to Text? <input type="checkbox"/> E-Mail _____ Dependent of Another <input type="checkbox"/> Give \$3 to Presidential Fund <input type="checkbox"/> Active-Duty Military <input type="checkbox"/> US Citizen <input type="checkbox"/> US Permanent Resident <input type="checkbox"/> Current Mailing Address: _____
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- Check if Taxpayers 1&2 lived apart during the year. If so, did you live together any day after June 30<sup>th</sup>?  Yes  No
- Taxpayer(s) had medical insurance all year. Provide 1095-A, 1095-B, or 1095-C received from your insurance company/employer.
- Taxpayer(s) were a resident of and/or earned income from multiple states during the year. Which states? \_\_\_\_\_
- Taxpayer 1 or 2 gifted more than \$18,000 to one individual during the tax year?
- Taxpayer 1 or 2 paid quarterly estimated taxes to the IRS or state? Provide dates and amounts of each payment.

### INCOME ITEMS

- Wage Statement – W-2s
- Social Security or SSDI Income
- Tips or Overtime (Last Paystub)
- 1099-NEC or 1099-MISC
- Received Interest (1099-INT)
- Received Dividends (1099-DIV)
- Sold Stocks/Bonds (1099-B)
- Pension/IRA/401K Distro (1099-R)
- Received Unemployment (1099-G)
- Inheritance or Trust Beneficiary
- Own an S-Corp or C-Corp (K1)
- Own an LLC or Partnership (K1)

- Bought or Sold a home (1099-S)
- Alimony (Paid or Received)
- Sold Cryptocurrency (1099-DA)
- Received Personal 1099-K
- Gambling Winnings/Loss (W2-G)

### DEDUCTION ITEMS

- Paid Loan Interest on a US Auto
- Military Ordered Moving Expenses
- Contributed to Traditional IRA
- Contributed to Roth IRA
- Contributed to 529 Plan
- Backdoor Roth IRA (1099-R)
- Paid College Tuition (1098-T)

- Paid a Mortgage or HELOC (1098)
- Medical & Dental Expenses/Miles
- Educator Classroom Expenses
- Paid Student Loans (1098-E)
- Paid Real Estate Taxes
- Paid Personal Property Excise Tax
- Charity or Religious Contributions
- Significant Disaster Loss or Theft
- Debt Cancellation (1099-C)

### DEPENDENTS

- Supported Non-Relative(s)
- Supported Family Member(s)

\*\*\* Enter dependent info on back >>>

Are you self-employed, own rental property, operate a farm, or have a side-hustle?  Yes  No *If yes, provide related income & expenses, asset purchases & sales, payroll returns, estimated tax payments and contractor payments (1099s).*

- You or your spouse drove your personal vehicle for Uber, Lyft, Grub Hub or any other such service. (Mileage Log)

Provide your bank account info to have your refund direct deposited. The US Treasury will no longer issue paper refund checks.

Bank \_\_\_\_\_ Routing # \_\_\_\_\_ Acct # \_\_\_\_\_  Checking  Savings

If you have a tax balance due, do you want to have the taxes debited from this bank account?  Yes  No

How do you prefer your final tax return to be delivered to you? You may check more than one option.

- Printed Paper Copy (Pick Up)
- Printed Paper Copy (Mail – Postage Fees Apply)
- Digital Copy (PDF)

Form Completed By: \_\_\_\_\_

Date Completed: \_\_\_\_\_

A dependent, for tax purposes, can be a qualifying child, relative, or other person who relies on you for financial support and meets certain requirements.

	<b>Dependent 1</b>	<b>Dependent 2</b>	<b>Dependent 3</b>	<b>Dependent 4</b>
Legal Name				
Birthdate				
Social Security #				
Relationship to Taxpayer(s)				
Could anyone else qualify to claim this dependent? Y or N				
Did you allow anyone else to claim this dependent in 2025?				
# Months Lived in Your Household in 2025				
Note: You may not claim the (A)CTC or ODC for a child living in your home for less than 6 mos. There is an exception for temporary absences, such as living on campus while in college.				
College Student Status: FT – PT – None?				
Employed? FT – PT – None?				
Files a Tax Return? Y or N				
To ensure your tax return is not negatively affected by costly errors, we offer to prepare necessary tax returns for dependents listed on your tax return at no additional cost.				
Disabled? Y or N				
Daycare / Camp / Eldercare Expense	\$	\$	\$	\$
# of Months with Health Insurance Coverage in 2025				
United States Citizen? Y or N				
Open a Trump Account? Y or N				
Children born between 1/1/2025 and 12/31/2028 may be eligible for a \$1,000 Pilot Contribution and children born before 2025 who are under 10 years old may qualify for \$250 based on ZIP code.				

You may qualify for certain tax credits, increased standard deduction, or filing status based on the dependent information listed above, including the following:

Earned Income Credit  Child Tax Credit  Additional Child Tax Credit  Other Dependent Credit  American Opportunity Tax Credit  Head of Household.

Were any of these tax credits disallowed or reduced by the IRS in a prior year? (You would have received a notice from the IRS)  Yes  No

Can you provide documentation, if required, to substantiate your eligibility for these tax credits and/or Head of Household filing status?  Yes  No

*Documentation examples include (but not limited to) the following: Birth Certificate, School Records, Medical Records, Child Care Provider Statement, Social Service Records or Statement, Place of Worship Statement, Household Receipts, Tuition Statements, and more.*