



2025 Tax Information Sheet

Taxpayer Name: _____ Occupation: _____
Phone #: (____) _____ - _____ Email: _____

Spouse Name (if applicable): _____ Occupation: _____
Phone #: (____) _____ - _____ Email: _____

How would you like to receive your client copy of the tax return? (Check **only** one)

- Printed copy
 PDF copy and we will print signature pages/vouchers for you
 All electronic - PDF copy with an electronic signature (you may have specific items to print and mail)

If you are to receive a refund, we must have banking information. The IRS will no longer issue checks.

- Direct deposited to your account we have on file (Fill out information below **only** if bank info changed)
Financial Institution: _____ Checking or Savings
Routing Number: _____ Account Number: _____
 Apply the refund as a credit to your 2026 tax liability.

If you worked overtime during the year, please provide final pay stub or statement from your employer with hours worked.

If you purchased a brand-new vehicle personally within the U.S. in 2025, please provide VIN for car loan interest tax deduction.

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|---|----|-----|
| Did you have a change in marital status? _____ | NO | YES |
| Did you have a change in dependents? _____ | NO | YES |
| Did you have a change in address? If so, please provide move date and new address below | NO | YES |
| If your dependent children have income, would you like us to prepare their tax returns? | NO | YES |
| Did you make estimated tax payments? If so, please provide exact amounts & dates paid on below line | NO | YES |
| Did you receive (as a reward, awards, or payment for services or property), sell, exchange, gift, or dispose of a digital asset (or a financial interest in a digital asset)? | NO | YES |
| Do you own a direct financial interest in any foreign accounts or have signature authority? | NO | YES |
| Did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? | NO | YES |
| Did you install energy efficient home improvements for your primary residence? If so, please provide details | NO | YES |
| Did you purchase health insurance through the Health Insurance Marketplace? | NO | YES |

***If you answered yes to above, you will need to provide Form 1095-A**

- Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, attach the IRS letter for filing a 2024 tax return. This is needed to e-file the tax returns
- NO YES

****If you are claiming dependents on your tax return or college tax credits, please ask for our Due Diligence Questionnaire.**

Additional Information, Comments, Questions: _____

ALL INFORMATION I HAVE GIVEN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE

Signature: _____ Date: _____
