



2025 RETURNING CLIENT INFORMATION SHEET

Required for all returning clients.

Please do not return this form via email.

YOUR PERSONAL INFORMATION

FIRST NAME		FIRST NAME	
LAST NAME		LAST NAME	
HOME #		HOME #	
CELL #		CELL #	
EMAIL		EMAIL	

MAILING ADDRESS	APT OR LOT NUMBER	
CITY	STATE	ZIP

If you prefer direct deposit of your refund(s), please provide your banking information.

Name of Bank		Routing #	
Account Number		[] Checking or [] Savings	

YOUR MARITAL STATUS AND HOUSEHOLD INFORMATION

ON DECEMBER 31, 2025 were you: (Check appropriate box below)

[] SINGLE [] LEGALLY MARRIED [] LEGALLY SEPARATED [] DIVORCED [] WIDOWED

YES NO UNSURE

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Are you or your spouse legally blind ?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Were you or your spouse a fulltime student in 2025?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Can you or your spouse be claimed on someone else's tax return for 2025?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Are there any dependents you are no longer claiming? If so please list their name _____
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	New dependent in 2025? If so, please complete the dependent info sheet.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did any of your dependents have unearned income (interest etc) over \$1,350 or earned income over \$15,750?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you pay for childcare while you worked or looked for work?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did anyone in your household attend college in 2025? If so, include Form 1098-T

HEALTHCARE

YES NO UNSURE

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you or any member of your family purchase health insurance through the Marketplace (Healthcare.gov/Obamacare) in 2025? If so, please provide all Forms 1095-A for 2025.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you receive funds from or contribute to an Health Savings Account for 2025? If so, include Form 1099-SA

VIRTUAL CURRENCY AND FOREIGN BANK ACCOUNTS

YES NO UNSURE

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you or your spouse receive, sell, exchange or otherwise acquire any financial interest in virtual currency in 2025?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you have any interest in or a signature authority over a foreign bank , security or other financial account?

MISC

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you earn overtime pay in 2025? If so, and info is not on your W2, please provide your last pay stub of 2025.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you earn tip income in 2025? If so, and info is not on your W2 or you are self-employed, please provide documentation.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you finance the purchase of a new vehicle in 2025 and pay interest?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you purchase a new or used Electric Vehicle in 2025?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you make any energy efficient improvements to your primary residence in 2025?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Would you like to opt into a Trump Account for a dependent under age 18?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did the IRS assign you an Identity Theft PIN (IP PIN) this year or in the past?

ESTIMATED TAX PAYMENTS

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you make estimated tax payments for 2025 or apply a 2024 refund towards your 2025 taxes?
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