

## Returning Client Drop Off Information

Name \_\_\_\_\_

Date \_\_\_\_\_

Phone Number (\_\_\_\_) \_\_\_\_\_

Email \_\_\_\_\_

Do you own a house? Yes\_\_ No\_\_ **(Include property tax bill paid in 2025)**

Monthly Rent Amt Pd \$\_\_\_\_\_ Heat: Incl\_\_ Not Incl\_\_ Months rented in '25\_\_\_\_\_

Did you receive any overtime pay in 2025? Yes\_\_ No\_\_ **If yes, please include last paystub dated 2025.**

Any change in Bank Information? Yes\_\_ No\_\_

Any change in Address? Yes\_\_ No\_\_ **(Please list any changes below)**

Any change in dependents for 2025? Yes\_\_ No\_\_

-ADD- Name\_\_\_\_\_ DOB\_\_\_\_\_ SSN\_\_\_\_\_

-Remove\_\_\_\_\_

Any Charity donations? Cash/Check\_\_\_\_\_ Goods\_\_\_\_\_ QCD's\_\_\_\_\_

Any Student Loan interest paid in 2025? **(1098-E)** Yes\_\_ No\_\_

Did anyone attend a post-secondary (College) during 2025? (1098-T) Yes\_\_ No\_\_

If yes, How many years of College did the student complete?\_\_\_\_\_

**(If yes, please provide 1098-T from the school.)**

Was anyone enrolled in a private grade or high school during 2025? Yes\_\_ No\_\_

(If yes, please provide a statement of paid tuition from the school.)

Did you pay health insurance NOT PROVIDED by an EMPLOYER in 2025? Yes\_\_ No\_\_

If so, how much?\_\_\_\_\_

**Did you receive a 1095A for Marketplace health coverage in 2025? Yes\_\_ No\_\_**

Do you have a Health Savings Account? Yes\_\_ No\_\_ **(Need 1099-SA) W-2 Box 12 code W**

Any cryptocurrency transactions in 2025? (ex. Bitcoin) Yes\_\_ No\_\_

Any Unemployment Income**(1099G)**? Yes\_\_ No\_\_

Any Investments accounts? (Include 1099-B or 1099-DIV) Yes\_\_ No\_\_

Any Energy Efficient Home Improvements? Yes\_\_ No\_\_ **(Include Receipts)**

New windows\_\_\_\_\_, Doors\_\_\_\_\_, or Insulation cost\_\_\_\_\_

Furnace\_\_\_\_\_, Central air\_\_\_\_\_, or Water heater cost\_\_\_\_\_

Please list any change of the basic information from last year's tax return:

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