

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:
