GARY D HARTMAN CPA

2545 BOMBAY LANDING
VIRGINIA BEACH, VA 23456
garyd@hartmancpa.com

January 15, 2026

:

The enclosed packet has been prepared to assist you in gathering information for your 2025 tax return. Review the entire packet and answer any questions that apply.

Certain lines in the packet contain information from last year's return. <u>You do not need to change the dollar amounts from last year; these figures are provided for reference only</u>.

Bring [mail or drop off] this packet and all supporting documents, including W-2 and 1099 statements, to your tax-preparation appointment.

I appreciate your trust in my business.

Contact me at (757)301-1040 if you have any questions or need additional information.

Sincerely,

Gary D Hartman
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PRIVACY POLICY FOR GARY D HARTMAN CPA

Your privacy is important to me, and maintaining your trust and confidence is one of my highest priorities. I respect your right to keep your personal information confidential and understand your desire to avoid unwanted solicitations. I am required to disclose my Privacy Policy to you – which I am more than happy to do. I hope that by taking a few minutes to read it, you will have a better understanding of what I do with the information you provide me and how I keep it private and secure.

A. Types of Information I Collect

I collect certain personal information about you – but only when that information is provided by you or is obtained by me with your authorization. I use that information to prepare your personal income tax returns.

Examples of sources from which I collect information include:
• interviews and phone calls with you,
• letters or e-mails from you,
• tax-related documents you provide that are required for processing tax returns, such as
Forms W-2, 1099R, 1099-INT and 1099-DIV, and stock transactions
• tax return or financial planning organizers, and
• financial history questionnaires.

B. Parties to Whom I Disclose Information

As a general rule, I do not disclose personal information about my clients or former clients to anyone. However, to the extent permitted by law and any applicable state Code of Professional Conduct, certain nonpublic information about you may be disclosed in the following situations:

• To comply with a validly issued and enforceable subpoena or summons.
• In the course of a review of my firm's practices under the authorization of a state or national licensing board, or as necessary to properly respond to an inquiry or complaint from such a licensing board.
• To provide information to nonaffiliated third parties who perform services or functions for me in conjunction with my services to you, but only if I have a contractual agreement with the other party which prohibits them from disclosing or using the information other than for the purposes for which it was disclosed. (Examples of such disclosures include using an outside service bureau to process tax returns or engaging a records-retention agency to store prior year records.)

C. Confidentiality and Security of Nonpublic Personal Information

Except as otherwise described in this notice, I restrict access to nonpublic personal information about you to employees of my firm and other parties who must use that information to provide services to you. Their right to further disclose and use the information is limited by the policies of my firm, applicable law, our Code of Professional Conduct, and nondisclosure agreements where appropriate. I also maintain physical, electronic, and procedural safeguards in compliance with applicable laws and regulations to guard your personal information from unauthorized access, alteration, or premature destruction.

Thank you for allowing me to serve your tax planning needs. I value your business and I am committed to protecting your privacy.

If you have any questions about my privacy policy, contact me at (757)301-1040.

Sincerely,

Gary D Hartman
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VIRGINIA BEACH, VA 23456
garyd@hartmancpa.com

Subject: Preparation of Your 2025 Tax Returns

:

Thank you for choosing GARY D HARTMAN CPA to assist you with your 2025 taxes. This letter confirms the terms of my engagement with you and outlines the nature and extent of the services I will provide.

I will prepare your 2025 Federal and Resident State Income Tax returns. (If you are aware of any additional State Returns to be prepared please inform me, or if I become aware of an additional State Return that needs to be filed, I will inform you. These returns will be prepared at an additional cost upon your approval.) I will rely upon the completeness and accuracy of the information and representations you provide to prepare your tax returns. I may ask you to clarify some items but will not audit or otherwise verify the data you submit.

I will prepare your 2025 Federal and Resident State Income Tax returns in accordance with the Statements on Standards for Tax Services issued by the American Institute of Certified Public Accountants and the U S Treasury Department Circular 230. It is your responsibility to safeguard your assets and maintain accurate records pertaining to transactions.

For current clients I will prepare your tax return based upon your filing status as reflected last year. Please advise if there has been a change in your filing status. For Married returns I will do a Married Filing Jointly comparison with Married Filing Separately and advise you which filing status is more favorable. I will follow the position you request.

I will use my judgment to resolve questions in your favor where a tax law is unclear, provided I have a reasonable belief there is substantial authority for doing so. Should I encounter instances of conflicts in the interpretation of the law, I will outline the reasonable courses of action and the risks and consequences of each. I will follow the position you request, provided it is consistent with my understanding of the tax reference material being used.

You may be required to make quarterly estimated tax payments. Per the IRS, "Individuals generally have to make estimated tax payments if they expect to owe tax of $1,000 or more". Per Virginia, "if your income tax liability after subtracting income tax withheld and allowable credits is expected to be more than $150, then you must make estimated payments or have additional income tax withheld". If your tax liability exceeds either of these limits on your 2025 tax return I will calculate these payments for the 2026 tax year using the safe harbor rules. If you expect your 2026 income to change from the 2025 amounts, let me know so I can adjust these estimated payments. When filing your 2025 return I can schedule these payments to come from your bank account on the due dates. Otherwise, I will provide vouchers for you to submit your payments.

I will help you to respond to minor inquiries by any governmental agency or tax authority but this engagement does not include responding to a "tax examination or audit". If you ask me to represent you, I will confirm in a separate Agreement.

I will not respond to any request from banks, mortgage brokers or others for verification of any information reported on these returns. I do not communicate with third parties or provide them with copies of tax returns. I will provide you with an additional copy of the returns for you to submit to them.

I will provide you with an Income Tax Organizer to help you compile and document the information necessary to prepare your income tax returns. You must complete the Organizer with accurate and complete information. INCOME FROM ALL SOURCES, INCLUDING OUTSIDE THE UNITED STATES IS REQUIRED. JUST BECAUSE YOU DON'T RECEIVE A 1099 OR OTHER TAX FORM DOES NOT MEAN THAT THE INCOME IS NOT TAXABLE.

You are responsible for maintaining adequate documentation to substantiate the accuracy and completeness of your tax return. You should retain all documents that provide evidence and support for your return.

The IRS considers a gift to be a transfer to an individual, either directly or indirectly, where full consideration is not received in return. Under Federal Law in 2025 gifts under $19,000 do not require a gift tax return. You, as the donor, can give $19,000 per taxpayer without a gift tax return being required. For a married couple each spouse is limited to $19,000. THERE IS NO JOINT GIFT TAX RETURN.

For Schedule C filers and/or Schedule E filers you are responsible for ensuring that personal expenses, if any, are segregated from business and/or rental expenses and that expenses such as meals, travel, vehicle use, gifts and related expenses are supported by documentation and records required by the IRS and other taxing authorities.

It is your responsibility to inform me if you directly or indirectly hold any interest or signatory authority in any assets located in a foreign country. Based upon the information which you provide, this information will be used to calculate any applicable foreign tax credits. I will also use this data to inform you of any additional filing requirements, which may include Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts (FBAR). Failure to file required forms can result in the imposition of both civil and criminal penalties, which can be significant.

As you may know the IRS has begun asking about virtual currency, wanting to know if you "received, sold, exchanged or acquired any interest". So be sure to answer the question on the questionnaire. Also, note **the IRS position is the selling or exchanging virtual currency is identical to the sale of a capital asset and must be reported on the tax return.**

You have the final responsibility for the accuracy of your tax returns. I will provide you with a copy of your electronic return and accompanying schedules and statements for review prior to filing with the IRS, state and/or local tax authorities. You agree to review and examine them carefully for accuracy and completeness.

You will be required to verify and sign a completed Form 8879, IRS e-file Signature Authorization and any similar state and local equivalent authorization before your returns can be filed electronically.

I am required under IRS and State rules to e-file your returns, however, you may opt out. [I will prepare the form 8948 to submit with the return]. You will be solely responsible to file the returns with the appropriate taxing authorities if you decide to mail the returns.

The filing due dates for Federal tax returns is April 15, 2026 and for and most states. You must provide the information needed to prepare your tax returns no later than April 5, 2026. Failure to do so may result in the inability to complete your return by the original filing due dates.

It may be necessary to apply for an extension of the filing deadline if there are unresolved issues or delays in processing, or if I do not receive all the necessary information from you on a timely basis.

To the extent you wish to engage me to apply for extensions of time to file tax returns on your behalf, you must notify me by email or in writing. **[Extensions are for time to file your return and not to pay, you will be subject to paying late penalties if taxes are not paid on the date due even if you have an extension]** In some cases, your signature may be needed on such applications prior to filing. Failure to timely file for an extension of time to file can result in penalties for failure to file tax returns, which accrue from the original due date of the returns, and can be substantial. **Please note, although I will file your extension, if your information can not be submitted to me before August 15, 2026 I will be unable to prepare your return as I will be on limited office hours from May 1, 2026 to August 31, 2026. I WILL NOT HAVE ANY OFFICE HOURS FROM SEPTEMBER 1, 2026 to DECEMBER 31, 2026. It will be your responsibility to find a preparer.**

As a service to you, it is my policy to check the box on all returns to allow the IRS and other taxing authorities to discuss your tax account information with me. If you do not want this box checked please let me know.

Again this year, as in the past, I'm offering a secure server. To those who which to participate, the secure server allows you to upload your tax information to me and allows you to download and/or print a copy of your return. You will also be able to sign your E-File Signature pages online for free. If you wish to take advantage of this free service please email or call and I can send you a link to create your account. To those who have participated in the past your account is the same.

Again this year I have included a link on my website [https://hartmancpa.com] to allow you to schedule your appointment for in person drop-offs, stay and do, and pickups.

For those that mail their information to me or drop off your return in my mailbox. I still maintain a secured mailbox. Due to the Post Office service track record, I would highly recommend that information be mailed as Priority Mail [this provides a tracking number for free]. Also, please note sending mail Certified adds time to the delivery date.

My fee is based on the time required at standard billing rates [$105 per hour] plus out-of-pocket expenses with a minimum of $105.00. Invoices are due and payable upon presentation. All accounts not paid within thirty (30) days are subject to interest charges to the extent permitted by state law.

I will return any original records, other than the Federal and State Copies of the Forms W2; 1099's; etc., you provide at the end of this engagement. Store these records, along with all supporting documents, in a secure location. I retain copies of your records and my work papers from your engagement for up to three years, after which these documents will be destroyed. **However, I recommend that you retain copies of your records and return for at least seven years as that is the longest the IRS has been known to go back in non-fraud cases.**

My engagement to prepare your 2025 tax returns will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and my subsequent submittal of your tax return.

In response to <u>Executive Order 14247,</u> *"Modernizing Payments to and From America's Bank Account,"* the IRS is making a swift transition away from sending or receiving paper checks. For the most part, the IRS will stop issuing tax refunds in the form of paper checks after September 30, 2025. IRS is also taking steps to require that taxpayers make all payments to the IRS electronically. However, it is anticipated that the electronic payments requirement will not occur until 2027 or later.

Below are descriptions of new provisions from the One, Big, Beautiful Bill Act, signed into law on July 4, 2025, as Public Law 119-21, that go into effect for 2025.

<u>"No Tax on Tips"</u>

New deduction: Effective for 2025 through 2028, employees and self-employed individuals may deduct qualified tips received in occupations that are listed by the IRS as customarily and regularly receiving tips on or before December 31, 2024, and that are reported on a Form W-2, Form 1099, or other specified statement furnished to the individual or reported directly by the individual on Form 4137.

Taxpayers must:

include their Social Security Number on the return and

file jointly if married, to claim the deduction.

Reporting: Employers and other payors must file information returns with the IRS (or SSA) and furnish statements to taxpayers showing certain cash tips received and the occupation of the tip recipient.

The IRS will provide transition relief for tax year 2025 for taxpayers claiming the deduction and for employers and payors subject to the new reporting requirements.

<u>"No Tax on Overtime"</u>

New deduction: Effective for 2025 through 2028, individuals who receive qualified overtime compensation may deduct the pay that exceeds their regular rate of pay – such as the "half" portion of "time-and-a-half" compensation -- that is required by the Fair Labor Standards Act (FLSA) and that is reported on a Form W-2, Form 1099, or other specified statement furnished to the individual.

Maximum annual deduction is $12,500 ($25,000 for joint filers).

Deduction phases out for taxpayers with modified adjusted gross income over $150,000 ($300,000 for joint filers).

Taxpayer eligibility: Deduction is available for both itemizing and non-itemizing taxpayers.

Taxpayers must:

include their Social Security Number on the return and

file jointly if married, to claim the deduction.

Reporting: Employers and other payors are required to file information returns with the IRS (or SSA) and furnish statements to taxpayers showing the total amount of qualified overtime compensation paid during the year.

Guidance: The IRS will provide transition relief for tax year 2025 for taxpayers claiming the deduction and for employers and other payors subject to the new reporting requirements.

“No Tax on Car Loan Interest”

New deduction: Effective for 2025 through 2028, individuals may deduct interest paid on a loan used to purchase a qualified vehicle, provided the vehicle is purchased for personal use and meets other eligibility criteria. (Lease payments do not qualify.)

Maximum annual deduction is $10,000.

Deduction phases out for taxpayers with modified adjusted gross income over $100,000 ($200,000 for joint filers).

Qualified interest: To qualify for the deduction, the interest must be paid on a loan that is:

originated after December 31, 2024,

used to purchase a vehicle, the original use of which starts with the taxpayer (used vehicles do not qualify),

for a personal use vehicle (not for business or commercial use) and

secured by a lien on the vehicle.

If a qualifying vehicle loan is later refinanced, interest paid on the refinanced amount is generally eligible for the deduction.

Qualified vehicle: A qualified vehicle is a car, minivan, van, SUV, pick-up truck or motorcycle, with a gross vehicle weight rating of less than 14,000 pounds, and that has undergone final assembly in the United States.

Final assembly in the United States: The location of final assembly will be listed on the vehicle information label attached to each vehicle on a dealer's premises. Alternatively, taxpayers may rely on the vehicle’s plant of manufacture as reported in the vehicle identification number (VIN) to determine whether a vehicle has undergone final assembly in the United States.

The VIN Decoder website for the National Highway Traffic Safety Administration (NHTSA) provides plant of manufacture information. Taxpayers can follow the instructions on that website to determine if the vehicle’s plant of manufacture was located in the United States.

Taxpayer eligibility: Deduction is available for both itemizing and non-itemizing taxpayers.

The taxpayer must include the Vehicle Identification Number (VIN) of the qualified vehicle on the tax return for any year in which the deduction is claimed.

Reporting: Lenders or other recipients of qualified interest must file information returns with the IRS and furnish statements to taxpayers showing the total amount of interest received during the taxable year.

Guidance: The IRS will provide transition relief for tax year 2025 for interest recipients subject to the new reporting requirements.

Deduction for Seniors

New deduction: Effective for 2025 through 2028, individuals who are age 65 and older may claim an additional deduction of $6,000. This new deduction is in addition to the current additional standard deduction for seniors under existing law.

The $6,000 senior deduction is per eligible individual (i.e., $12,000 total for a married couple where both spouses qualify).

Deduction phases out for taxpayers with modified adjusted gross income over $75,000 ($150,000 for joint filers).

Qualifying taxpayers: To qualify for the additional deduction, a taxpayer must attain age 65 on or before the last day of the taxable year.

Taxpayer eligibility: Deduction is available for both itemizing and non-itemizing taxpayers.

Taxpayers must:

include the Social Security Number of the qualifying individual(s) on the return, and

file jointly if married, to claim the deduction.

PLEASE NOTE - Most States are Non-Conforming for the above new tax laws - meaning they do not follow Federal Law for Taxable Income unless their is a law passed in the state to conform with the Federal Government tax laws. Therefore, some states may delay accepting returns until their legislative bodies have had time to act.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign this letter in the space indicated and return it to me [with the organizer; by email [garyd@hartmancpa.com] or by mail [2545 Bombay Lndg, Virginia Beach, VA 23456]. If I receive the organizer and other tax information and this letter unsigned or without this letter it will be treated that you are agreeing to be bound by the terms set forth above.

Thank you for the opportunity to be of service. If you have any questions, contact me at (757)301-1040.

Sincerely,

Gary D Hartman
GARY D HARTMAN CPA

(Both spouses must sign for preparation of joint returns.)

Accepted By:

____
Taxpayer

____
Spouse

____
Date

Checklist

Name: SSN:

Checklist

This checklist is provided to help you gather necessary information for us to prepare your 2025 income tax return. Return this list, along with the supporting documentation, to our office and let us know of any significant changes from your 2024 tax year.

General Information and Prior Year Documentation

- ☐ Proof of identity for those claimed on the return (driver's license or state issued ID, Social Security card, birth certificates for children. etc.)
- ☐ Income tax returns from the prior two years
  If there were losses from business activities in prior years, include prior five years of returns instead of two
- ☐ Depreciation schedules from prior years for businesses, rentals, etc.

Current Year Income Documentation

- ☐ Wage and tax statements (Form W-2)
- ☐ Gambling income (Form W2-G)
- ☐ IRA distributions, pensions, and annuities (Form 1099-R)
- ☐ Dividend income (Form 1099-DIV)
- ☐ Interest income (Form 1099-INT)
- ☐ Miscellaneous income (Form 1099-MISC)
- ☐ Nonemployee compensation (Form 1099-NEC)
- ☐ Unemployment compensation and other government payments (Form 1099-G)
- ☐ Credit card, debit card, and third-party network transactions (Form 1099-K)
- ☐ Reportable payment transactions
- ☐ Social Security benefits (Form SSA-1099)
- ☐ Railroad retirement benefits (Form RRB-1099)
- ☐ Income from partnerships, S corporations, estates, and trusts (Schedule K-1)
  - ☐ Basis information for any partnerships and S corporations
- ☐ Documentation of brokerage transactions and disposition of capital assets (Form 1099-B)
- ☐ Digital asset proceeds from brokerage transactions (Form 1099-DA)
- ☐ Proceeds from real estate transactions (Form 1099-S)
- ☐ Self-employed business income (Schedule C)
- ☐ Farm income (Schedule F)
- ☐ Farm rental income (Form 4835)
- ☐ Income from rental real estates and royalties (Schedule E)

Other Income (provide supporting documentation for income received for the following items)

- ☐ Sale of assets or property
- ☐ Cancellation of debt
- ☐ Other income ____

Payments (provide supporting documentation for payments made for the following items)

- ☐ Educator classroom expenses
- ☐ Employee business expenses
- ☐ Contributions to a Health Savings Account
- ☐ Expenses related to work relocation with the military
- ☐ Alimony
- ☐ Student loan interest
- ☐ Refunded student loan interest payments
- ☐ Student loan forgiveness
- ☐ Tuition and fees for higher education
- ☐ Expenses related to child or dependent care
- ☐ Contributions to a Retirement Savings Account
- ☐ Medical and dental expenses
- ☐ Real estate taxes

Checklist

Name: SSN:

Checklist

- [ ] Other state and local taxes
- [ ] Mortgage interest
- [ ] Investment interest
- [ ] Cash contributions
- [ ] Noncash contributions (provide organization name)
- [ ] Unreimbursed employee expenses
- [ ] Investment expenses
- [ ] Gambling losses
- [ ] Other payments ____

Questionnaire

Name: SSN:

Questionnaire

Personal Information

Yes No

- ☐ ☐ Did your marital status change during the year?
  If "Yes," explain. ____________________
- ☐ ☐ Did your name change during the tax year?
  If "Yes," explain. ____________________
- ☐ ☐ If your filing status is married, but you are filing separately from your spouse, did you and your spouse live apart for the last six months of 2025?
- ☐ ☐ Can you or your spouse be claimed as a dependent by someone else?
- ☐ ☐ Did your address change during the year?
- ☐ ☐ Were you, your spouse, or any dependents a victim of identity theft?
  If "Yes," explain. ____________________
- ☐ ☐ Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)?
  If "Yes," provide Notice CP01A from the IRS.

Provide proof of identity to be eligible to e-file your tax return (driver's license or state-issued photo ID)

Dependent Information

Yes No

- ☐ ☐ Did you have any changes in dependents during the year?
  If "Yes," explain. ____________________
- ☐ ☐ Can another person qualify to claim any of your dependents?
- ☐ ☐ Did you have any child or dependent care expenses during the year?
- ☐ ☐ Did you have any adoption expenses during the year?
- ☐ ☐ Did you have any children under age 18 or a full-time student under age 24 with more than $2,700 of unearned income?

Provide documentation for proof of dependent credits (school records, medical records, daycare records, etc.)

Health Care Information

Yes No

- ☐ ☐ Did any member of your household have healthcare coverage through the Marketplace (Obamacare)?
  If "Yes," provide copies of Form 1095-A.
- ☐ ☐ Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?

Income, Purchases, Sales, and Debt Information

Yes No

- ☐ ☐ Did you receive any tips not reported to your employer?
- ☐ ☐ Did you receive any disability income during the year?
- ☐ ☐ Did you cash in any U.S. savings bonds during the year?
- ☐ ☐ Did you start a new business or purchase any rental property during the year?
- ☐ ☐ Did you sell an existing business, rental property, or other property during the year?
- ☐ ☐ Did you purchase any business assets or convert any assets to business use?
  If "Yes," provide the cost of the asset, the date it was placed in service, and the business use percentage.
- ☐ ☐ Did you purchase any gasoline, diesel, or special fuels for off-road business use?
- ☐ ☐ Did you buy or sell any stocks, bonds, or other investments during the year?
- ☐ ☐ Did you sell a principal residence during the year?
  If "Yes," provide closing documentation for the purchase and sale of the home.
- ☐ ☐ Did you have a principal residence or a piece of real property foreclosed on during the year?
- ☐ ☐ Did you abandon a principal residence or a piece of real property during the year?
- ☐ ☐ Did you refinance your principal home or second home or take out a home equity loan during the year?
  If "Yes," provide all escrow, closing, and other pertinent documentation and information.
- ☐ ☐ Did you receive any principal or interest during this year from property sold in prior years?

Questionnaire

Name: SSN:

Questionnaire

- ☐ ☐ Did you rent out your home or use it for business?
- ☐ ☐ Did you sell, exchange, or purchase any real estate during the year?
- ☐ ☐ Did you acquire a new or additional interest in a partnership or S corporation?
- ☐ ☐ Did you have any debts canceled or forgiven this year?
- ☐ ☐ Does anyone owe you money that has become uncollectible?
- ☐ ☐ Did you purchase a new or previously owned clean vehicle (electric vehicle, plug-in hybrid, fuel-cell vehicle, qualified commercial clean vehicle) during the year?
  If "Yes," provide the report the dealer or seller is required to provide to you and the vehicle identification number (VIN).
- ☐ ☐ Did you receive income or incur expenses associated with a fantasy sports league?
  If "Yes," provide documentation.
- ☐ ☐ Did you receive income or incur expenses associated with car sharing (e.g., Lyft or Uber)?
  If "Yes," attach Form 1099-MISC, Form 1099-NEC, or Form 1099-K.
- ☐ ☐ Did you receive income or incur expenses associated with freelancing (e.g., Upwork or TaskRabbit)?
  If "Yes," attach Form 1099-K or Form W-2.
- ☐ ☐ Did you receive income or incur expenses associated with fashion sharing (e.g., Poshmark or thredUP)?
  If "Yes," provide documentation.
- ☐ ☐ Did you receive income or incur expenses associated with crowdfunding (e.g., Kickstarter or Indiegogo)?
  If "Yes," attach Form 1099-K.
- ☐ ☐ Did you receive income or incur expenses associated with a short-term rental (e.g., Airbnb, VRBO or HomeAway)?
  If "Yes," provide documentation.
- ☐ ☐ Did you receive income or incur expenses as an independent contractor (e.g., Shipt, Instacart, DoorDash)?
  If "Yes," provide documentation.
- ☐ ☐ Did you receive any other income you have not provided information for with this organizer?
  If "Yes," explain. ____

Itemized Deduction Information

Yes No

- ☐ ☐ Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) during the year?
- ☐ ☐ Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year?
- ☐ ☐ Did you receive any state or local income tax refunds from prior years?
- ☐ ☐ Did you make any major purchases (vehicle, boat, etc.) during the year?
- ☐ ☐ Did you pay any real estate property taxes or personal taxes during the year?
- ☐ ☐ Did you pay mortgage interest during the year?
- ☐ ☐ Did you make cash donations to charity during the year?
- ☐ ☐ Did you make noncash donations to charity (clothes, furniture, etc.) during the year?
- ☐ ☐ Did you donate a boat or vehicle during the year?
  If "Yes," attach Form 1098-C.
- ☐ ☐ Did you have gambling winnings or losses during the year?
- ☐ ☐ Did you have any job-related expenses that were not reimbursed by your employer (uniforms, safety equipment, etc.)?
- ☐ ☐ Did you use your vehicle on the job other than for commuting to work?
- ☐ ☐ Did you work out of town at any time during the year?

Retirement Information

Yes No

- ☐ ☐ Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
- ☐ ☐ Did you make any withdrawals or receive distributions from a pension or profit-sharing plan, IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?
- ☐ ☐ Did you execute any rollovers from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?

Questionnaire

Name: SSN:

Questionnaire

☐ ☐ Did you receive any Social Security benefits during the year?

Education Information

Yes No

☐ ☐ Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)?

☐ ☐ Did anyone in your household attend a post-secondary school during the year?

☐ ☐ Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year?

☐ ☐ Did you pay student loan interest for yourself, your spouse, or your dependents during the year?
  If "Yes," provide the amount of interest that was refunded.

☐ ☐ Did you receive forgiveness on a qualifying federal student loan?

Foreign Tax Information

Yes No

☐ ☐ Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?

☐ ☐ Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?

☐ ☐ Did the aggregate value of your foreign accounts exceed $10,000 at any time during the year?

☐ ☐ Did you have any income from, or pay taxes to, a foreign country?

☐ ☐ Did you receive a Schedule K-3 from a partnership or S corporation?

☐ ☐ Did you have ownership in a foreign corporation at any time during the year?

☐ ☐ Did you own property in a foreign country?

Refund, Withholding, and Estimated Tax Information

Yes No

☐ ☐ If you have an overpayment of 2025 taxes, do you want the refund applied to your 2026 estimated taxes?

☐ ☐ Did you make any estimated payments toward your 2025 taxes?

☐ ☐ Did you apply an overpayment of your 2024 taxes to your 2025 estimated taxes?

☐ ☐ Do you want to have any refund or balance due directly deposited or withdrawn? NOTE: Due to Executive Order 14247, Modernizing Payments to and from America's Banking Account, refunds received by check will be delayed at least six weeks. Direct deposit of refunds is recommended.
  If "Yes," provide a canceled checking or savings slip.

☐ ☐ Do you anticipate your income or withholdings to be different for 2026?

One Big Beautiful Bill Implications

Yes No

☐ ☐ Did you receive qualified tips reported on Form W-2 or a statement provided by your employer?
  If "Yes," provide documentation or amount.

☐ ☐ Did you receive overtime pay reported on Form W-2 or a statement provided by your employer?
  If "Yes," provide documentation or amount.

☐ ☐ Did you purchase a new passenger vehicle for personal use during 2025?
  If "Yes," are the following true:

  Yes No

  ☐ ☐ The final assembly was in the U.S.?

  ☐ ☐ The gross vehicle weight is under 14,000 pounds?

  ☐ ☐ The vehicle was not purchased with a lease?

  ☐ ☐ The vehicle was used to secure the loan?

☐ ☐ If you have a dependent born during 2025, do you want to establish a Trump Account?

  Yes No

  ☐ ☐ If "Yes," do you want to receive a $1,000 pilot program contribution?

Miscellaneous Information

Questionnaire

Name: SSN:

Questionnaire

Yes	No	
☐	☐	Did you receive, sell, exchange, gift, or otherwise dispose of any digital asset or financial interest in any digital asset? If "Yes," provide any Forms 1099-DA received.
☐	☐	Did you incur a gain or loss due to damaged or stolen property, while living in a federally declared disaster area? If "Yes," provide the incident date, value of the property, amount of insurance reimbursements, and the declaration number assigned by FEMA.
☐	☐	Did you pay wages to any household employees (babysitter, nanny, housekeeper, etc.)?
☐	☐	Did you make gifts to any one person in excess of $19,000 during the year?
		Yes ☐ No ☐ If "Yes," are you splitting the gift with your spouse?
☐	☐	Did you incur moving expenses with the military during the year?
☐	☐	Did you make any energy-efficient improvements to your main home during the year?
☐	☐	Are you a business owner who paid health insurance premiums for your employees during the year?
☐	☐	Did you receive a cash payment or digital asset of more than $10,000 in one transaction or two or more related transactions during the year?
		Yes ☐ No ☐ If "Yes," was Form 8300, Report of Cash Payment over $10,000 Received in Trade or Business, filed?
☐	☐	Do you own interest or shares in or did you dispose of a Qualified Opportunity Fund during the year?
☐	☐	Did you make any purchases subject to use tax during the year? If "Yes," provide details.
☐	☐	Did you receive any notices from the IRS or state taxing authority? If "Yes," explain. ____
☐	☐	May the IRS discuss your tax return with your preparer?
☐	☐	Would you like a copy of your tax return sent to you electronically instead of receiving a printed copy?

Preparer Notes

Income

Name: SSN:

Wages & Salaries

Provide all copies of Form W-2

TS	Employer Name	2025 Federal Wages

Retirement

Provide all copies of Form 1099-R

TS	Payer Name	2025 Distribution

☐ Yes ☐ No Did you take a distribution from an IRA and give it to an organization eligible to receive tax-deductible contributions?

☐ Yes ☐ No Did you use any of the distributions for disaster relief?

Income

Name: SSN:

Dividend Income

Provide all copies of Form 1099-DIV and other statements that report dividend income.

TSJ	Account Number Payer Name	2025 Ordinary Dividends	2025 Qualified Dividends

Interest Income

Provide all copies of Form 1099-INT, Form 1099-OID, and other statements that report interest income.

TSJ	Account Number Payer name	2025 Interest

If any interest income listed above is from a seller-financed mortgage, provide the payer's ID number and address

Sale of Capital Assets

Name: SSN:

Sale of Capital Assets (including items not reported on Form 1099-B)

Provide all brokerage statements

TSJ	Description of Property	Date Purchased	Date Sold	Sales Price	Cost

Installment Sale Income

TSJ _____ Description of property: _____

Date acquired _____ Date sold _____

	2025	Prior Years
Selling price		
Mortgages assumed		
Cost of property sold		
Depreciation allowed		
Commissions and expense of sale		
Gross profit percentage		
Interest received		
Principal payments received		

Property was sold to a related party ☐

Other Income and Adjustments

Name: SSN:

Other Income

	2025 Taxpayer	2025 Spouse
Social Security Benefits (attach Forms 1099-SSA)		
Railroad Retirement Benefits (attach Forms 1099-RRB)		
State income tax refund (attach Forms 1099-G)		
Alimony received Divorce or separation date ______ Amount		
Unemployment compensation (attach Forms 1099-G)		
Unemployment compensation repaid in 2025		
Gambling winnings (attach Forms W2-G)		
Alaska Permanent Fund		
Jury duty pay		
ABLE distributions		
Scholarships or grants not reported on Form W-2		
Other income:		

Adjustments

	2025 Taxpayer	2025 Spouse
Educator expenses (If you are an educator, enter the amount you paid for classroom supplies)		
Contributions made to a Health Savings Account (HSA)		
Payments made for Self-Employed Health Insurance for you, your spouse, or dependents		
Alimony paid Name ______ SSN ______ Divorce or separation date ______		
Name ______ SSN ______ Divorce or separation date ______		
Contributions made to a Self-Employed Pension plan (SEP), SIMPLE, or Solo 401K		
Contributions made to an Individual Retirement Account (IRA)		
Contributions made to a Roth IRA		
Interest paid on a student loan		
Other adjustments:		

Additional Deductions

Name: SSN:

Additional Deductions

	2025 Taxpayer	2024 Taxpayer	2025 Spouse	2024 Spouse
Enter any income from Puerto Rico that you excluded				
Enter the amount from Form 4563, Line 15				
If Form W-2, Box 5, is $176,100 or less, enter qualified tips included in Form W-2, Box 7.				
Qualified Tips included on Form 4137, line 1(c)				
If you received qualified tips from one employer.				
Qualified tips received in the course of a trade or business				
Qualified overtime compensation included on Form W-2, Box 1				
Qualified overtime compensation included on Form 1099-NEC, Box 1 or Form 1099-MISC, Box 3				

Passenger Vehicle Loan Interest

TS ____

Loan origination date . . . . ________

Outstanding principal . . . . ________

Year . . . . ________

Make ________

Model ________

Vehicle identification number (VIN)

____

Business interest . . . . ________

Personal Interest . . . . ________

TS ____

Loan origination date . . . . ________

Outstanding principal . . . . ________

Year . . . . ________

Make ________

Model ________

Vehicle identification number (VIN)

____

Business interest . . . . ________

Personal Interest . . . . ________

TS ____

Loan orinination date . . . . ________

Outstanding principal . . . . ________

Year . . . . ________

Make ________

Model ________

Vehicle identification number (VIN)

____

Business interest . . . . ________

Personal Interest . . . . ________

TS ____

Loan origination date . . . . ________

Outstanding principal . . . . ________

Year . . . . ________

Make ________

Model ________

Vehicle identification number (VIN)

____

Business interest . . . . ________

Personal Interest . . . . ________

Schedule C - Profit or Loss from Business

Name: SSN:

General Business Information

TS ____ Professional product or service ____________ Employer ID number ____________

Business name ____________

Business address, city, state, ZIP ____________

Accounting Method: ☐ Cash ☐ Accrual ☐ Other (specify) ____________

☐ This business started or was acquired during 2025.

☐ This business was disposed of during 2025.

Select if this business is for:

☐ Professional gambler

☐ Exempt Notary income

☐ Newspaper delivery and you are under 18 years of age

☐ A clergy

Yes	No	
☐	☐	Payments of $600 or more were paid to an individual, who is not your employee, for services provided for this business.
☐	☐	If "Yes," did you file Forms 1099 for the individuals?
☐	☐	Did you receive a Paycheck Protection Program (PPP) loan for this business prior to June 1, 2021?
☐	☐	If 'Yes," was any portion of the loan forgiven in 2025?

Income

	2025		2025
Gross receipts or sales		Other income	
Returns & allowances			

Expenses

	2025		2025
Advertising		Repairs & maintenance	
Car & truck expenses		Supplies	
Commissions & fees		Taxes & licenses	
Contract labor		Travel	
Depletion		Total meals	
Employee benefit programs		Utilities	
Insurance (other than health)		Wages	
Interest - mortgage		Family health coverage payments for taxpayer, spouse or dependents	
Interest - other		Other expenses (list)	
Legal & professional services			
Office expenses			
Pension & profit-sharing plans			
Rent or lease (vehicles, machinery, & equipment)			
Rent (other business property)			

Cost of Goods Sold

	2025		2025
Inventory at beginning of year		Materials & supplies	
Purchases		Other costs	
Cost of personal use items		Inventory at end of year	
Cost of labor		☐ There was a change in inventory method.	

Schedule E - Income or Loss from Rental Real Estate & Royalties

Name: SSN:

General Property Information

TSJ ____

Property description ____________________

Address, city, state, ZIP ____________________

Select the property type

- ☐ Single family residence
- ☐ Vacation / short-term rental
- ☐ Land
- ☐ Self-rental
- ☐ Multi-family residence
- ☐ Commercial
- ☐ Royalties
- ☐ Other ____________

Number of days property was rented ________ Number of days property was used for personal use ________

If the rental is a multi-dwelling unit and you occupied part of the unit, enter the percentage you occupied ________

- ☐ This property was placed in service during 2025.
- ☐ This property was disposed of during 2025.
- ☐ This property is your main home or second home.
- ☐ This property was owned as a qualified joint venture.

Yes	No	
☐	☐	Payments of $600 or more were paid to an individual, who is not your employee, for services provided for this rental.
☐	☐	If "Yes," did you file Forms 1099 for the individuals?

Income

	2025		2025
Rent income		Royalties from oil, gas, mineral, copyright or patent	

Expenses

	Rental Unit Expenses	Rental and Homeowner Expenses
Advertising		
Auto & travel		
Cleaning & maintenance		
Commissions		
Insurance		
Legal & professional fees		
Management fees		
Mortgage interest		
Other interest		
Repairs		
Supplies		
Taxes		
Utilities		
Depletion		
Other expenses		

If this Schedule E is for a a multi-unit dwelling and you lived in one unit and rented out the other units, use the "Rental and homeowner expenses" column to show expenses that apply to the entire property. Use the "Rental unit expenses" column to show expenses that pertain ONLY to the rental portion of the property.

If the Schedule E is not for a multi-unit property in which you lived in one unit, complete just the "Rental unit expenses" column.

Income or Loss from Investments in Partnerships, S Corporations, and Fiduciaries

Name: SSN:

Schedule K-1 from Partnerships, S Corporations, Estates and Trusts

Provide all copies of Schedule K-1 and attachments

TS	Entity Name	EIN

Schedule F - Profit or Loss from Farming

Name: SSN:

General Information

TS ____ Principal product ____ Employer ID number ____

Accounting method, if not cash: ☐ Accrual

☐ This farm was disposed of during 2025.

Yes	No	
☐	☐	Payments of $600 or more were paid to an individual, who is not your employee, for services provided for this farm.
☐	☐	If "Yes," did you file Forms 1099 for the individuals?
☐	☐	Did you receive a Paycheck Protection Program (PPP) loan for this business prior to June 1, 2021?
☐	☐	If "Yes," was any portion of the loan forgiven in 2025?

Income

	2025		2025
Sale of livestock / other items		Custom hire income	
Cost of items bought for resale		Beginning inventory for accrual	
Sale of products you raised		Ending inventory for accrual	
Total cooperative distributions (Provide 1099-PATR)		☐ You used unit-livestock-price or farm-price inventory method.	
Total agricultural payments		Other income	
Commodity Credit Corporation (CCC) loans:			
CCC loans reported			
CCC loans forfeited			
Crop insurance proceeds:			
Amount received in 2025			
☐ You elect to defer to 2026			
Amount deferred from 2024			

Expenses

	2025		2025
Car & truck expenses		Rent - other (land, animals, etc.)	
Chemicals		Repairs & maintenance	
Conservation expenses		Seeds & plants purchased	
Custom hire (machine work)		Storage & warehousing	
Employee benefit programs		Supplies purchased	
Feed purchased		Taxes	
Fertilizers & lime		Utilities	
Freight & trucking		Veterinary, breeding, & medicine	
Gasoline, fuel, & oil		Family health coverage payments for taxpayer, spouse or dependents	
Insurance (other than health)		Other expenses	
Interest - mortgage (paid to banks, etc.)			
Interest - other			
Non-W-2 labor hired			
W-2 wages paid			
Pension & profit-sharing plans			
Rent - vehicles, machinery, & equipment			

Form 4835 - Farm Rental Income and Expenses

Name: SSN:

General Information

TSJ ____ Employer ID Number ____________

Description ______________________________

☐ This farm was disposed of during 2025

Income

	2025		2025
Income from production of livestock, produce, grains, & other crops		Crop insurance proceeds:	
Total cooperative distributions		Amount received in 2025	
Total agricultural payments		☐ You elect to defer to 2026	
Commodity Credit Corporation (CCC) loans:		Amount deferred from 2024	
CCC loans reported		Other income	
CCC loans forfeited			

Expenses

	2025		2025
Car & truck expenses		Seeds & plants purchased	
Chemicals		Storage & warehousing	
Conservation expenses		Supplies purchased	
Custom hire (machine work)		Taxes	
Employee benefit programs		Utilities	
Feed purchased		Veterinary, breeding, & medicine	
Fertilizers & lime		Other expenses (list)	
Freight & trucking			
Gasoline, fuel, & oil			
Insurance (other than health)			
Interest - mortgage (paid to banks, etc.)			
Interest - other			
Labor hired (less jobs credit)			
Pension & profit-sharing plans			
Rent - vehicles, machinery & equipment			
Rent - other (land, animals, etc.)			
Repairs & maintenance			

Expenses Related to Business

Name: SSN:

Auto Expense

Name of business vehicle is used for ____________________

Description of vehicle ____________________ Date vehicle was placed in service ____________

Yes	No		Yes	No	
☐	☐	Was this vehicle available for use during off-duty hours?	☐	☐	Do you have evidence to support your deduction?
☐	☐	Was another vehicle available for personal use?	☐	☐	If "Yes," is the evidence written?

Mileage

Number of miles the vehicle was driven during 2025

Business	____________	Other	____________
Commuting	____________		

Expenses

Garage rent	____________	Repairs	____________
Gas	____________	Tires	____________
Insurance	____________	Tolls	____________
Licenses	____________	Lease addback	____________
Oil	____________	Other expenses	
Parking fees	____________	____________	____________
Rental fees	____________	____________	____________
Interest	____________	____________	____________
Property tax	____________	____________	____________

Business Use of Home

Name of business home is used for ____________________

What is the total square footage of your home that was used regularly and exclusively for business? ____________

What is the total square footage of your home? ____________

For daycare facilities not used exclusively for business, complete the following questions

How many days during the year was the area used? ____________

How many hours per day was the area used? ____________

☐ The daycare facility was in operation for the entire year

Expenses	Office expenses	Home expenses
Mortgage interest	____________	____________
Real estate taxes	____________	____________
Excess mortgage interest	____________	____________
Excess real estate taxes	____________	____________
Insurance	____________	____________
Rent	____________	____________
Repairs & maintenance	____________	____________
Utilities	____________	____________
Other expenses	____________	____________

In the "Office expenses" column, enter those expenses that pertain exclusively to your office; in the "Home expenses" column, enter those expenses that pertain to the entire dwelling.

Household Employment

Name: SSN:

TSJ______ Employer Identification Number ________________

Yes	No	
☐	☐	Did you pay any one household employee cash wages of $2,700 or more in 2025?
☐	☐	Did you withhold federal income tax during 2025 for any household employee?
☐	☐	Did you pay total cash wages of $1,000 or more in any calendar quarter of 2024 or 2025 to all household employees?
☐	☐	Did you pay unemployment contributions to only one state?
☐	☐	Did you pay all state unemployment contributions for 2025 by April 15, 2026?
☐	☐	Were all wages that are taxable for FUTA tax also taxable for your state's unemployment tax?

	2025
Total cash wages subject to Social Security tax	
Total cash wages subject to Medicare tax	
Total cash wages subject to Additional Medicare tax withholding	
Federal income tax withheld	
Qualified sick leave wages	
Qualified family leave wages	
Qualified health plan expenses	

TSJ______ Employer Identification Number ________________

Yes	No	
☐	☐	Did you pay any one household employee cash wages of $2,600 or more in 2025?
☐	☐	Did you withhold federal income tax during 2025 for any household employee?
☐	☐	Did you pay total cash wages of $1,000 or more in any calendar quarter of 2024 or 2025 to all household employees?
☐	☐	Did you pay unemployment contributions to only one state?
☐	☐	Did you pay all state unemployment contributions for 2025 by April 15, 2026?
☐	☐	Were all wages that are taxable for FUTA tax also taxable for your state's unemployment tax?

	2025
Total cash wages subject to Social Security tax	
Total cash wages subject to Medicare tax	
Total cash wages subject to Additional Medicare tax withholding	
Federal income tax withheld	
Qualified sick leave wages	
Qualified family leave wages	
Qualified health plan expenses	

Schedule A - Itemized Deductions

Name: SSN:

Medical and Dental Expenses

Health insurance premiums (paid by you, not through work) . . . . ______

Amount above that is for Medicare premiums . . . . . ______

Long-term care premiums (you) . . . . ______

Long-term care premiums (your spouse) . . . . ______

Long-term care premiums (dependents) . . . . ______

Mileage driven for medical purposes . . . . ______

Out of pocket medical & dental expenses

- Doctor, dental, etc . . . . ______
- Prescription medicines . . . . ______
- Glasses & contacts . . . . ______
- Hearing aids . . . . ______
- Medical equipment & supplies . . . . ______
- Hospital services . . . . ______
- Laboratory services . . . . ______
- Nursing services . . . . ______
- Other ______ ______
- Other ______ ______

Taxes Paid

State and local income taxes . . . . ______

General sales tax (vehicle, boat, home, etc.) . . . . ______

Real estate taxes . . . . ______

Personal property taxes . . . . ______

Auto registration taxes not deductible for state . . . . ______

Other taxes (list) ______ ______

______ ______

______ ______

Interest Paid

Home mortgage interest paid (attach Form 1098) . . . . . ______

☐ Some of your home mortgage loan was not used to buy, build, or improve your home.

Home mortgage interest paid to an individual . . . . ______

Paid to:

Name ______

Address ______

City, State, ZIP ______

SSN or EIN ______

Points not reported on Form 1098 . . . . ______

Investment interest . . . . ______

Charitable Contributions

Donations to charity	Cash	Noncash	Amount
Church	☐	☐	______
Boy or Girl Scouts	☐	☐	______
Goodwill	☐	☐	______
Red Cross	☐	☐	______
Salvation Army	☐	☐	______
United Way	☐	☐	______
Veterans	☐	☐	______
Hospital	☐	☐	______
University	☐	☐	______
Other ______	☐	☐	______

Miles driven for charitable purposes . . . . ______

Other Miscellaneous Deductions

Amortizable bond premiums . . . . ______

Federal estate tax . . . . ______

Gambling losses . . . . ______

Impairment-related work expenses . . . . ______

Claim repayments . . . . ______

Unrecovered pension investments . . . . ______

Loss from other activities from Schedule K-1 . . . . ______

Ordinary loss debt instrument . . . . ______

Excess deduction on termination . . . . ______

Job Expenses & Certain Miscellaneous Deductions

Necessary job expenses you paid that were not reimbursed by your employer

- Safety equipment, tools, & supplies . . . . . . ______
- Uniforms . . . . ______
- Protective clothing (shoes, hardhats, glasses, etc.) ______
- Dues to professional organizations . . . . ______
- Books & subscriptions . . . . ______
- Other ______ ______

Union dues . . . . ______

Tax preparation fees . . . . ______

Other nonpersonal expenses related to taxable income

- Safe deposit box fees . . . . ______
- Investment expenses not entered elsewhere . . ______
- Other ______ ______

Home equity interest . . . . ______

Other Information

Name: SSN:

Mortgage Interest

Provide all copies of Form 1098

TSJ	Lender's Name	Mortgage Interest Received	Mortgage Insurance Premiums	Real Estate Taxes Paid

Employee Business Expenses

TS_____

Select if you are:
- ☐ A qualified performing artist
- ☐ A fee-based state or local government official
- ☐ A disabled employee with impairment-related work expenses
- ☐ An Armed Forces reservist
- ☐ You are a member of the clergy

Select if you:
- ☐ Used your personal vehicle for your job during 2025

	NOT reimbursed by your employer	Reimbursed by your employer not included in box 1 of your W-2
Parking fees, tolls, local transportation		
Meals		
Overnight business travel expenses (Do not include meals & entertainment)		
Other business expenses		

Casualties and Thefts

TSJ_____ FEMA code	TSJ_____ FEMA code
Property description	Property description
Property location	Property location
Date property was acquired	Date property was acquired
Date property was damaged or stolen	Date property was damaged or stolen
Cost of property damaged or stolen	Cost of property damaged or stolen
Fair market value before incident	Fair market value before incident
Fair market value after incident	Fair market value after incident
Insurance reimbursement	Insurance reimbursement

Other Information

Name: SSN:

Health Savings Account

TS _____

The taxpayer's coverage is under a high-deductible health plan for:

☐ Taxpayer only ☐ Family

	2025
HSA contributions made for 2025	
Total distributions from all HSAs during 2025	
Distributions included above that were rolled over into another account	
Qualified medical expenses paid using HSA distributions	

Education Expenses Provide all copies of Form 1098-T

Student name ______ Student name ______

Type of Expense	Amount	Type of Expense	Amount

Student name ______ Student name ______

Type of Expense	Amount	Type of Expense	Amount

Job-related Moving Expenses

TSJ_____

☐ Select this box and complete the fields below if you are a member of the Armed Forces on active duty, and moved due to a military order for a permanent change of station.

	2025
Number of miles from old home to old workplace	
Number of miles from old home to new workplace	
Expenses to transport and store household goods and personal effects	
Travel and lodging expenses while traveling to your new home	

2025 Tax Organizer
Personal Information

Personal Information

	Name	SSN	Has IP PIN	Date of Birth
Taxpayer			☐	
Spouse			☐	

Name of person to whom all information should be addressed, if not the taxpayer

Street address, city, state, and ZIP

	Occupation	Daytime Phone	Evening Phone	Cell Phone
Taxpayer				
Spouse				

Taxpayer email	
Spouse email	

Filing status at the end of 2025

☐ Single ☐ Married ☐ Widowed - If widowed and your spouse died after December 31, 2023, enter the date of death ____________

☐ Married filing separately - If married but filing separately, did you live apart from your spouse for the last six months of 2025? ____________

Yes	No	
☐	☐	Are you or your spouse blind?
☐	☐	Are you or your spouse disabled?
☐	☐	Are you or your spouse a full-time student?
☐	☐	Do you or your spouse want to designate $3 to go to the Presidential Election Campaign Fund?
☐	☐	At any time during 2025 did you: (a) receive (as a reward, award, or payment for property or service) a digital asset? (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

Identification Information

Taxpayer's type of photo ID

☐ Driver's license ☐ State-issued photo ID

Photo ID number ____________

State photo ID was issued ____________

Date photo ID was issued ____________

Date photo ID expires ____________

Spouse's type of photo ID

☐ Driver's license ☐ State-issued photo ID

Photo ID number ____________

State photo ID was issued ____________

Date photo ID was issued ____________

Date photo ID expires ____________

Account Information for Deposits and Withdrawals

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account		Use this Account for	
			Checking	Savings	Deposits	Withdrawals
			☐	☐	☐	☐
			☐	☐	☐	☐

Appointment Information

Your 2025 appointment is scheduled for ____________

Dependent and Other Information

Name: SSN:

Dependent Information

First and Last Name SSN	Has IP PIN	Relationship	Months in Home	Date of Birth	Disabled	Full-time Student	Childcare Expenses
	☐				☐	☐	
	☐				☐	☐	
	☐				☐	☐	
	☐				☐	☐	
	☐				☐	☐	

List dependents required to file a return ______

Child and Other Dependent Care Expenses

Name of Care Provider	Address	SSN or EIN	Amount Paid

Estimates

	Federal		Resident State		Resident City	
	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
Overpayment applied from 2024						
First quarter						
Second quarter						
Third quarter						
Fourth quarter						
Additional payments						

Income

Name: SSN:

Form 1099-MISC Income

Provide all copies of Form 1099-MISC

TS	Payer Name	2025 Amount

Form 1099-NEC Income

Provide all copies of Form 1099-NEC

TS	Payer Name	2025 Amount