Client Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

List any changes you had last year.

Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dependents \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bank Account for Direct Deposit \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Driver’s License: Front Desk staff will scan it into your file.

Did you have any foreign income (any financial interest in or signatory authority over a financial account located in a foreign country)? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Crypto currency (Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency)? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

American Opportunity (college) credit

1098 T from the college

College financial statement

Receipts for books, computer, other things necessary or required

**Checklist for Drop-Offs**

Check Yes or No if you have the information with you today. If you check No, add the information to the back side of this sheet or bring it into the office as soon as possible.

**New Clients**

**YES NO**

|  |  |  |  |
| --- | --- | --- | --- |
| **1** | Name of Taxpayer(s) and Dependents |  |  |
| **2** | Social Security Number for Taxpayer(s) and dependents |  |  |
| **3** | Birthdates of everyone on the tax return |  |  |
| **4** | Address |  |  |
| **5** | Phone number(s) |  |  |
| **6** | Email |  |  |
| **7** | Driver’s License of Tax Payer(s) (will be scanned and returned) |  |  |
| **8** | Birth Certificate of Dependents if new (will be scanned and returned) |  |  |
| **9** | Direct Deposit Information |  |  |
| **10** | Filing Status: |  |  |
|  | Married Filing Joint (MFJ) |  |  |
|  | Married Filing Separate (MFS) |  |  |
|  | Single |  |  |
|  | Head of Household (HOH) |  |  |

**New and Returning Clients** Yes No

|  |  |  |  |
| --- | --- | --- | --- |
| **11** | If you claim HOH or Single with a dependent, we need proof that the child lived with you more than half the year (something with child’s name and your address on it) |  |  |
| **12** | Did you and your dependents have medical insurance all year? |  |  |
|  | Through your Employer |  |  |
|  | Through Your Self |  |  |
|  | MN Sure: Need Form 1095A |  |  |
| **13** | Are you a member of the military? |  |  |

**Head of Household**

|  |  |  |  |
| --- | --- | --- | --- |
| **14** | If you claim HOH, do you live with a significant other? |  |  |
| **15** | How much does it cost to maintain your home each month? |  |  |
|  |  | Cost | You Pay |
|  | Mortgage/Rent |  |  |
|  | Utility Bills |  |  |
|  | Groceries |  |  |
|  | Repairs |  |  |
|  | Property Tax |  |  |
|  | Home Insurance |  |  |
|  |  |  |  |

Did you sell a home? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

We will need the original purchase price and a copy of the closing statement from the sale.

Did you make any energy efficient improvements? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you purchase an energy efficient vehicle? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

A single person would need to have better than $14,900 in expenses to benefit from itemization. For married persons $29,200 and HOH $21.900. If you think you can accumulate that amount our better, we would need receipts for the following: License Tabs, Form 1098 for Mortgage interest, Property Tax payments, Donations to goodwill or monetary to not for profit organizations, Union dues, Gambling activity report, last pay stub for 2024.

**Payment Options:**

We accept major credit and debit cards, checks or cash. We need payment before we obtain your signature to file so please be prepare to pay at that time or you will need to return at a time when you are able to make that payment.

Signature of Taxpayer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_