

Drop Off Form (Returning Clients 2025)

Today's Date _____

Taxpayer Name _____

Taxpayer Phone Number _____

Taxpayer Email address _____

Spouse Name _____

Spouse Phone Number _____

Spouse Email address _____

****Address Change? (Yes or No)**

If **YES**, please fill out new address:

Number, Street, Apt _____

City and Zip _____

****Change in Filing Status? (Yes or No):**

If **YES**, please choose: Single Married filing Jointly Married filing Separately Head of Household

If **change in filing status due to NEW spouse**: (if a Spouse was deceased in 2025, please provide DOD)

Name _____

Date of birth _____

SSN _____

Driver's License: (see below)

****Change in Dependents? (Yes or No) Let us know if you are NO LONGER claiming a child.**

If change in dependents is due to **NEW dependent**:

Name _____

Date of Birth _____

SSN _____

Note: If you had a child born in 2025, do you want to set up a Trump Account to get the \$1,000 government contribution? (Yes or No)

****New Bank Account? (Yes or No)** (for direct deposit or direct debit, if applicable)

If **YES**, please fill out new account info:

Bank Name _____ Checking or Savings (circle one)

Routing # _____

Account # _____

1. Was anybody covered through the **Marketplace (Obamacare)? (Yes or No)** If yes, we need **form 1095A**.
2. Did you receive, sell, or exchange any **cryptocurrency** (e.g., bitcoin)? **(Yes or No)**. If **you sold**, we need info.
3. Do any of the following apply? If none apply, you can write NO: _____
 - a. Teacher Deduction **(Yes or No) (Only for K-12 teachers)** How much (up to \$300)? _____
 - b. IRA contributions (does **NOT include** retirement plans thru work) **(Yes or No)**
Taxpayer contribution \$ _____ Spouse contribution \$ _____ **(Roth or Traditional)**
 - c. Out-of-pocket College expenses for you or dependents? **(Yes or No)** If yes, we need form(s) **1098-T**
 - d. Student Loan Interest paid in 2025? **(Yes or No)** If yes, we need form **1098-E**
 - e. Home **ENERGY** improvements? **(Yes or No)** If yes, please provide information.
 - f. Purchased Qualifying Electric Vehicle by September 30th, 2025? **(Yes or No)** If yes, please provide info.
 - g. Did you pay for **childcare**? **(Yes or No)** If yes, please provide form from provider
 - h. Did you pay interest on a Qualified New Vehicle purchased in 2025? **(Yes or No)** If yes, we will need more information.
 - i. Did you receive overtime pay in 2025? **(Yes or No)** If yes, we may need your last paystub if the amount is not shown on your W-2
 - j. Did you receive Tips in 2025? **(Yes or No)**
4. Did you **RENEW** or get a **NEW** driver's license since last year (or since we last prepared your return)? If yes, please provide updated license information below:

Taxpayer

DL# _____

State _____

Issue Date _____

Exp Date _____

Spouse

DL# _____

State _____

Issue Date _____

Exp Date _____