

# 2025 Drop Off Worksheet

Complete all necessary boxes for an accurate return.

Drop off Date: Preferred Contact Method: Best Time to Contact:

Taxpayers Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address	Taxpayers SSN
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City	State	Zip	Marital Status on Dec 31, 2025
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Home Phone  Single ☐ Separated ☐

Cell Phone ☐ Married ☐ Widowed

Email Address  ☐ Divorced

Taxpayers Identification # \_\_\_\_\_ State Issued: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Spouses Identification # \_\_\_\_\_ State Issued: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Spouses Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Spouses Cell Phone \_\_\_\_\_ Spouses SSN \_\_\_\_\_

Are either Taxpayer or Spouse Considered Legally Blind? ☐ Taxpayer ☐ Spouse ☐ Both

Do You Want to Donate to the MN Non-Game Wildlife Fund?      Yes / No      Amount:

Did you make estimated payments for the 2024 tax season?      Yes / No      If yes, please include documentation.

Are You a New Client?    Yes / No                  Do you have last year's return with you?    Yes / No

Do you want Direct Deposit or Direct Debit? If so please provide the information below:

Routing#	Account#
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## Dependent Information

[illegible]

**Circle all that apply to you and/or your spouse:**

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**Employment & Income Data**

W-2 forms for the year

Unemployment Income (Form 1099-G)

Last Pay Stub showing Over Time & Tip income

Miscellaneous Income including rent (Form 1099-MISC)

Partnership, S Corp, & Trust Income (Sch K-1)

Pensions & Annuities (Form 1099-R)

Social Security/RR1 Benefits (1099-SS or RRB-1099)

Gambling & Lottery winnings (1099-G or W-2G)

Scholarships & Fellowships

State income tax refunds (Form 1099-G)

Alimony received est before 1/1/19

Jury Duty Pay

Prizes & Rewards

Interest Income (1099-INT)

Dividend Income (1099-DIV)

Proceeds from Broker Transactions (Form 1099-B)

Any other income documents

**Self Employment Data**

Business income (Form 1099-MISC and/or records)

Partnership SE income: Sch K-1

Business expenses: Receipts, documents & records

Farm expenses: Receipts, documents & records

Employment taxes & other business taxes paid for current year

Auto loans & leases

**Receipts or listings of itemized expenses**

Out of pocket medical expenses/mileage

Gifts to Charity: cash & non-cash

Unreimbursed expenses related to Volunteer work

Investment Expenses

Job hunting expenses

Job related education expenses

Vehicle license tabs

Property tax statement/paid

Property tax refund paperwork

Mortgage interest paid

Tax preparation fees

Records for casualty or theft losses (police department)

**1099-K (if you collected more than \$600)**

**Other deductions**

Student Loan Interest Paid

Tuition payments

Daycare paid (Form W-10)

Alimony Paid-Including SSN of recipient est before 1/1/1

Rent paid (Form CRP)

Receipts for K-12 school supplies

Federal and/or state estimated tax paid for current year

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**Do you have documentation that proves the fore mentioned?**