

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**

City	State	Zip	Marital Status on Dec 31, 2025			
Home Phone			<input type="checkbox"/>	Single	<input type="checkbox"/>	Separated
Cell Phone			<input type="checkbox"/>	Married	<input type="checkbox"/>	Widowed
Email Address			<input type="checkbox"/>	Divorced		

Taxpayers Identification # **State Issued:** **Expiration Date:**

Spouses Identification # _____ State Issued: _____ Expiration Date: _____

Spouses Name: _____ Date of Birth: _____

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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#

Dependent Information

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

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

Do you have documentation that proves the fore mentioned?