



# Client Intake Form

New Clients, Drop-off & On-line Clients  
MUST COMPLETE this intake form.

Existing clients should complete this form if there have been significant changes this last year.

Taxpayer			SSN		
<i>First Name</i>	<i>M.I.</i>	<i>Last Name</i>	Email		IP PIN
Occupation	Date of birth		Are you new to our firm? Yes No		
Address		City	State	Zip	
County	Home phone		Work or cell		
Driver's License	<i>No.</i>	<i>State</i>	<i>Issue Date</i>	<i>Exp. Date</i>	

Spouse			SSN		
<i>First Name</i>	<i>M.I.</i>	<i>Last Name</i>	Email		IP PIN
Occupation	Date of birth		Are you new to our firm? Yes No		
Address <small>(If different from Taxpayer)</small>		City	State	Zip	
County	Home phone		Work or cell		
Driver's License	<i>No.</i>	<i>State</i>	<i>Issue Date</i>	<i>Exp. Date</i>	

If you moved during 2025, enter your previous address.	Date of move
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Marital status at 12/31/25: Single Married Separated Widow(er) Registered Domestic Partnership (RDP) Unsure  
 Were you divorced or separated during the year? Yes No      Were there any deaths in the family? Yes No  
**Did you receive, sell, exchange, gift or otherwise dispose of a digital asset (financial currency)?** Yes No

Names of dependent children <i>Child's full name</i>	<i>Social Security #</i>	<i>IP PIN</i>	<i>Date of birth</i>	<i>Months lived in home in 2025</i>	<i>Relationship taxpayer</i>	<i>College student?</i>

Did any of the children have unearned income above \$1,250 for the year? Yes No    Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2025? Yes No    Do any of the children have a disability? Yes No

**Other dependents or people who lived with you** *(use for additional dependent children, if more space is needed than provided above)*

<i>Name</i>	<i>Social Security #</i>	<i>IP PIN</i>	<i>Date of birth</i>	<i>Months lived in home in 2025</i>	<i>Relationship</i>	<i>Income</i>

Refund Direct Deposit Bank information: <i>Name of bank</i>		
<i>Checking</i>	<i>Savings</i>	<i>Routing transit number</i>
		<i>Account number</i>

**Wage & Payroll Detail (2025 Compliance)**

Did you receive premium overtime pay?  
 (Examples: double-time, contract overtime, special rate overtime)  
 Yes  No  Unsure

If Yes, was premium overtime separately identified on your W-2 or payroll statement?  
 Yes  No  Unsure

# Questions — All Taxpayers

(Provide related statements or other documentation.)

"You" refer to both taxpayer and spouse — enter "?" if unsure about a question.

additional tax information	Yes	No	Are either you or your spouse <b>over the age of 65, as of December 31, 2025?</b>				
	Yes	No	Did you pay or receive alimony in 2025? <b>Paid Received \$</b>	<b>Recipient's SSN</b>	<b>Date of divorce or separation</b>		
	Yes	No	Did you or anyone in your household purchase health insurance through the government market place? 1095A				
	Yes	No	<b>Did you have a Health Savings Account (HSA) during the year? Did you use any funds from it?</b> <b>No</b>				
	Yes	No	Did you itemize deductions on your taxes last year? <b>RECOMMEND TO COMPLETE FORM A Itemized Deductions</b>				
	Yes	No	Did you purchase a new energy-efficient car, truck, or van? provide purchased documents				
	Yes	No	Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?				
	Yes	No	Are you a member of the military?	State of residency			
	Yes	No	Are either you or your spouse legally blind?				
	Yes	No	Did you make any estimated federal or state tax payments? If yes, provide dates & amounts paid.				
	Yes	No	<b>Any significant changes in 2025, sale of your home, starting a new business, or purchase of rental property?</b> <i>List change(s):</i>				
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?				
	Yes	No	Did you pay any interest on a loan for an RV (or boat) that has a living quarters. If yes, provide details.				
	Yes	No	Do you own any rental property, or rented out a portion of your house as a rental? <b>USE FORM B Rental Property Organizer</b>				
	Yes	No	Were any children born or adopted in 2025? <b>(Provide statement for other expenses.)</b>				
Yes	No	Were any children attending college?	<b>Year in college</b>	Paid by you: <b>Tuition \$</b>	<b>Student loan interest \$</b>	<b>Books \$</b>	
				Paid by student: <b>Tuition \$</b>	<b>Student loan interest \$</b>	<b>Books \$</b>	
Yes	No	Did you pay any tuition for a private school for a dependent or take classes yourself? <b>Provide 1098T</b>					
		<b>Student</b>			<b>Amount paid \$</b>		
		<b>Name and address of school</b>					
Yes	No	Did you pay for child or dependent care so you could work or go to school? <b>(add statement if needed)</b>					
		<b>Name of provider</b>			<b>EIN or SSN</b>		
		<b>Address</b>			<b>Amount paid \$</b>		
Yes	No	Did you make any contributions to a 529 plan in 2025?					
Yes	No	Do you have any children who have unearned income of \$1,250 or more?					
income	Yes	No	<b>Total number W-2 forms</b> Taxpayer Spouse	<b>Total number of 1099-R statements</b> Taxpayer Spouse			
	Yes	No	Did you receive income from <b>Social Security</b> ? Social Security Statement SSA-1099 form(s)				
	Yes	No	Did you <b>receive any income reported on a 1099 form</b> 1099-NEC & 1099-MISC <b>COMPLETE FORM C</b>				
	Yes	No	Did you earn any interest or dividends this year? 1099-INT & 1099-DIV forms				
	Yes	No	Did you sell/transfer any stock during the year? 1099-B form(s) or 1099 consolidated statement				
	Yes	No	Did you receive any unemployment? 1099-G form(s)				
	Yes	No	Did you receive income from a gig economy activity (e.g. Airbnb, Uber, etc.) or from your own business? <b>COMPLETE FORM C</b>				
	Yes	No	Do you own a business or an interest in a partnership, corporation, LLC, farming activities, or other venture? <i>ex. K-1 forms</i>				
	Yes	No	Did you, or will you contribute any money to an IRA for 2025?	<b>Traditional IRA</b>	<b>Roth IRA</b>	<b>Provide 5498</b>	
	Yes	No	Did you roll over any amounts from a retirement account in 2025?				
	Yes	No	Were you granted, or did you exercise, any employee stock options during 2025?				
	Yes	No	Did you sell any rental/investment property or receive any income from an installment sale?				
	Yes	No	Did you pay sales taxes on a major purchase in 2025, such as a vehicle, boat, or home?				
	home & other finances	Yes	No	Did you make any charitable contributions in 2025? If yes, provide details			
		Yes	No	Did you purchase or sell a main home during the year? If yes, provide closing statement.			
Yes		No	If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.				
Yes		No	Did you refinance a mortgage or take a home equity loan? If yes, provide closing statement.				
Yes		No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?				
Yes		No	Did you make any new energy-efficient improvements to your home? <b>(e.g. solar, windows, etc.)</b> If yes, provide details.				
Yes		No	Did you make any other energy-efficient improvements to your home? <b>(e.g. weatherstripping, insulation, etc.)</b> If yes, provide details.				

**State information** Full-year resident Part-year resident Nonresident **If lived in another state, where?**

**List dates lived in other states:**

Do you rent or own your home? Rent Own