

2025 Tax Worksheet - Please fill out and bring to your appointment!

Taxpayer/Spouse Name _____ Birthdate _____ Social Security # (please verify) _____ Occupation _____

NEW ADDRESS (if any) _____

PHONE NUMBERS Home _____ Work _____ Cell _____ Fax _____

Taxpayer Email: _____ **Spouse Email:** _____

DEPENDENTS (if new client, list all; otherwise, list changes from last tax year):

Name	Birthdate	Social Security # (please verify)

SOURCES OF INCOME:

	Q OT:	Gross	Federal Tax	State Tax
W-2	Y / N	\$ _____	\$ _____	\$ _____
	Y / N	_____	_____	_____
	Y / N	_____	_____	_____
	Y / N	_____	_____	_____
	Y / N	_____	_____	_____
	Total W-2	\$ _____	_____	_____
1099-R		_____	_____	_____
Soc. Security		_____	_____	_____
1099-MISC		_____	_____	_____
Unemployment		_____	_____	_____
State Tax Refund		_____	_____	_____
Alimony Received (if divorce final before 2019)		_____	_____	_____
Gambling Winnings (1099-G)		_____	_____	_____
Other _____		_____	_____	_____
	Total Tax Withheld	_____	\$ _____	\$ _____

2025 ESTIMATED TAX PAYMENTS:

	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter
Date Paid:	_____	_____	_____	_____
Amount Paid:	_____	_____	_____	_____
			Total Amount: \$ _____	_____

INTEREST INCOME:

_____	\$ _____	Alimony Paid (if divorce before 2019) \$ _____
_____	\$ _____	Name: _____ SSN: _____
_____	\$ _____	Educator Out-of-Pocket Expenses \$ _____
_____	\$ _____	Early Withdrawal Penalties \$ _____

DIVIDEND INCOME:

_____	\$ _____	Student Loan Interest \$ _____
_____	\$ _____	Tuition (by individual, per form 1098T) \$ _____
_____	\$ _____	Undergraduate Studies \$ _____

SPECIAL ADJUSTMENTS:

HSA Contributions (not on W-2)	\$ _____	Graduate Studies \$ _____
HSA Distributions (Form 1099-SA)	\$ _____	Required Books & Supplies \$ _____
IRA Deposits (not on W-2)	\$ _____	Other \$ _____
Roth Deposits (not on W-2)	\$ _____	
Keogh/SEP Deposits(not on W-2)	\$ _____	

Taxpayer Name:

2025

DIGITAL **MAIL** **PICK UP**
(Must request paper copy-\$15 add'l charge applies)

ID Verification (for preparer use)