

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:

_____	\$ _____
_____	\$ _____
_____	\$ _____

DIVIDEND INCOME:

_____	\$ _____
_____	\$ _____
_____	\$ _____

SPECIAL ADJUSTMENTS:

HSA Contributions (not on W-2)	\$ _____
HSA Distributions (Form 1099-SA)	\$ _____
IRA Deposits (not on W-2)	\$ _____
Roth Deposits (not on W-2)	\$ _____
Keogh/SEP Deposits(not on W-2)	\$ _____

Alimony Paid (if divorce before 2019) \$ _____

Name: _____ SSN: _____

Educator Out-of-Pocket Expenses \$ _____

Early Withdrawal Penalties \$ _____

EDUCATION DEDUCTIONS/CREDITS:

Student Loan Interest \$ _____

Tuition (by individual, per form 1098T) \$ _____

Undergraduate Studies \$ _____

Graduate Studies \$ _____

Required Books & Supplies \$ _____

Other \$ _____

Taxpayer Name: _____

2025

☐ **ID Verification** (for preparer use)

DIGITAL MAIL PICK UP

(Must request paper copy-\$15 add'l charge applies)