Client Information Form
2025 Taxes

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CERTIFIED PUBLIC ACCOUNTANT

Tax Return Cannot Be Prepared Without Completing This Form

	Name	SSN	Date of Birth	No Change From Prior Year
Taxpayer				☐
Spouse				☐

Street Address, City, State and Zip ☐

	Occupation	Phone	Email	
Taxpayer				☐
Spouse				☐

Do you agree to receive text messages? Yes_____ No _____

Dependent Information

Name	SS No.	Relationship	Date of Birth	No Change From Prior Year
				☐
				☐
				☐

	Drivers License Number	State & Date Issued	Expiration Date
Taxpayer			
Spouse			

Are you married? Circle YES or NO	**Yes**	**No**
1. Has you marital status changed this year?	☐	☐
2. Did anyone in your house have Marketplace Insurance this past year? (If yes, please provide 1095-A form)	☐	☐
3. Did you have any Foreign Financial Accounts?	☐	☐
4. Did you have any digital assets or Crypto Currency?	☐	☐
5. Was Taxpayer or Spouse active millitary?	☐	☐
6. Do you have an Identity Protection Pin? (If yes, please include IRS letter)	☐	☐
7. If you are getting a tax refund, do you want any of it applied to next year's taxes?	☐	☐

Did you make Estimated Tax Payments for 2025? If so, please give amount:

FEDERAL TAXES Quarter 1:____________ Quarter 2:____________ Quarter 3:____________ Quarter 4:____________

STATE TAXES Quarter 1:____________ Quarter 2:____________ Quarter 3:____________ Quarter 4:____________

How would you like to receive YOUR tax return copy? Digital PDF ________ Paper Copy ________

If applicable, how would you like to receive your refund? Direct Deposit ________ Paper Check ________

If you owe for federal or state income taxes, how would you like to pay? Mail Check________ Draft from Bank Account________
Date of Draft ________________

Please provide banking information if you would like to have a refund deposited or a payment drafted

Bank name: ________________________________ ________ Checking ________ Savings

Routing # ________________________________ Account # ________________________________

Please see reverse side for current price list for services rendered.

FILING OF YOUR RETURN

Would you like us to E-file or paper-file your tax return? _________ E-File _________Paper File

E-Filing is the PREFERRED method by both the IRS and our firm. If you would like to paper file there will be a surcharge of $50.00 in addition to the standard rate.

******* Payment is required before returns will be E-Filed *******

Signature:____

Date:____

Tax Return Pricing

Married Filing Joint/HOH	**$225.00 base
Single	**$150.00 base
Single with Schedule C	**$200.00 base
Schedule C, E, F, Stock Trades	***Starts at $300 – add $50.00 per additional schedule.
Corporations, Partnerships	***$300.00 and up

****If a tax client has a dependent that is a student (in high school or college) and needs a tax return for W2 wages, there is no charge for their return.**

*****There will be additional bookkeeping fees for tax returns without summarized information.**

Any tax information received after March 10th will automatically be extended.