

REQUIRED FORM

Community Tax and Financial - 2025 Client Data Form

Taxpayer's Full Name		Date of Birth (if new client)	SSN (if new client)	
Spouse's Full Name		Date of Birth (if new client)	SSN (if new client)	
Mailing Address	City		State	ZIP Code
County of residence on 1/1/25 _____		School District? _____	Lived with spouse in last 6 months of the year? Yes No	
On 12/31/25 were you? _____ Single _____ Married _____ Married but wish to file Separately				

Household Information

Did you pay Property Taxes for your home in 2025?		Please indicate the amount paid if not already included with your documents \$ _____		
Did you pay Rent in 2025?	Monthly Rent \$ _____	Number of Months Rented _____		
Did you receive Unemployment in 2025? Yes No		If yes, please print a 1099-G from your account.		
Was your health insurance through the Marketplace/ACA/Obamacare ?		Yes No	If yes, provide FORM 1095-A	
Do you have any: Foreign Bank Accounts? Yes No		Virtual Currency (for example, Bitcoin)? Yes No		
Did you earn Overtime in 2025? Yes No If overtime was earned please provide a copy of your last paystub.				
Did you PURCHASE a BRAND New Auto in 2025 with a loan? Yes No If yes, the lender should provide a statement.				
Did you make quarterly estimated tax payments? Enclose payment info or include the payment amounts & dates below:				
1st qtr _____		2nd qtr _____		3rd qtr _____ 4th qtr _____

Dependents

For new Dependents and Clients we'll also need copies of Social Security Cards & Birth Certificates.
We MUST have Form 8332 signed by the custodial parent for any dependent that did not live with you over half the year.

Name	Relationship	Months Lived with you in 2025	Full Time Student?	Dependent's Estimated Income	Date of Birth	SSN (If new Dependent)

Amount paid for Childcare? \$ _____ Provider's Name, Tax ID or SS#, & Address is required.

Education Credit & Deduction Info

Were any dependents in Private K-12 or Homeschool?	Yes No If yes, how many? _____
Were you or a dependent enrolled in college in 2025?	Yes No If yes, form 1098-T from the college is required
Any Student Loan Interest paid in 2025?	\$ _____
Did you contribute to a 529 College Savings Plan in 2025?	Yes No If yes, provide 12/31/25 year end statements.

The IRS is no longer mailing refund checks. Please provide your bank info for any Refunds.

_____ DEPOSIT to Bank Account on FILE	_____ DEPOSIT to New Bank Account BELOW
Bank Name	Routing Number
Account Number (<u>Checking</u>) (or) (<u>Savings</u>)	

_____ I opt to have my tax preparation fees deducted from my refund. (An additional **\$49.95** in bank fees apply)

Taxpayer E-mail Address _____

Spouse E-mail Address _____

Taxpayer Phone Number _____

Spouse Phone Number _____

Taxpayer or Spouse Signature _____

Date _____