Name: _____
Email: _____
Phone: _____
Best time to Call: _____

1) Refunds: direct deposit to the same bank account that we have on file? YES NO
2) Owe Taxes: authorize us to withdraw the tax from the same bank account we have on file when we process your tax return on April 3rd (if early filing)? YES NO
3) I will provide new bank account info YES NO
provide a voided check or a copy of the routing # and account # directly from the bank
4) Any change in Marital Status or Dependents YES NO
5) New Driver's License – Provide a Copy YES NO
6) You/spouse have an Identity Protection Pin YES NO
7) Move/Buy/Sell/Refinance your Home YES NO
Provide: Settlement Sheet & Date Moved
8) Did you/spouse have a financial interest in or signature authority over a financial account (bank, brokerage) located in a foreign country? YES NO
9) Did you/spouse: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift or otherwise dispose of a digital asset (or a financial interest in a digital asset)? 1099-B or 1099-DA YES NO

INCOME

10) Wages Income Form W2 YES NO
Work Overtime – statement attached to W2 YES NO
11) Any Tips not reported on your W-2 YES NO
Provide: YTD paystub, tip log or earnings statement
12) Social Security Form 1099-SSA YES NO
13) Retirement or IRA withdraw Form 1099-R YES NO
In 2025 Required Minimum Distributions begin at age 73
14) Convert an IRA to a ROTH – Statements YES NO
15) Trust, Partnership, S-Corp Income Form K-1 YES NO
16) Receive Interest, Cash-in Bonds 1099-INT YES NO
17) Dividends 1099-DIV or Sell Stocks 1099-B YES NO
18) Solar or Geo-Thermal SREC Income YES NO
19) Any Grant or Scholarship Income YES NO
20) Unemployment Form 1099-G YES NO
21) Receive an Inheritance (you might get a **K-1**) YES NO
22) Cancellation of Debt Form 1099-C YES NO
23) Rent out Your Home or Another Property YES NO
24) Receive Funds from a Lawsuit/Settlement YES NO
25) Jury Duty Income YES NO
26) Election Judge Income YES NO
27) Alimony Paid or Received YES NO
28) Any Foreign Income from outside the USA YES NO
29) Gambling Winnings Form W-2G YES NO
30) Start a Business in 2025 YES NO
Did you Incorporate or Open an LLC in 2025 YES NO
31) Any Side Hustle / Hobby Income YES NO
32) Receive Form 1099-MISC or Form 1099-NEC YES NO
33) Receive Money via an App Form 1099-K YES NO
VENMO, Cash App, PayPal, eBay, Stripe, Etsy, etc…
Did you resell anything ie. Ravens tickets YES NO
If you sold items please provide the cost of the items sold

DEDUCTIONS & CREDITS

34) Contribute to an IRA or ROTH - Statements YES NO
35) Contribute to 1st Time Homebuyers Account YES NO
36) Contribute to a 529 Plan - Statements YES NO
Withdraw from 529 Plan – Statements YES NO
37) Contribute to ABLE Account – Statements YES NO
38) Contribute to HSA (Health Savings Account) YES NO
Distributions from HSA Form 1099-SA YES NO
39) Teacher Classroom Expenses (max $300) YES NO
expenses for K thru 12 must work 900 hrs yr
40) Paid on Student Loans Form 1098-E YES NO
41) Adopt a Child – Detailed list of expenses YES NO
42) Union Dues Paid – Provide: YTD Paystub YES NO
43) Are you a retired Correction or Public Safety Officer YES NO **From a State of Maryland Employer** YES NO
44) Are you a Volunteer Fire/Rescue/Ambulance YES NO
45) Mortgage Interest Paid Form 1098 YES NO
46) 2nd Home/RV/Boat Mortgage Interest Paid YES NO
47) Property Taxes Paid YES NO
48) Personal Property Tax Paid (VA, CT, MI, RI) YES NO
49) Charitable Contributions YES NO
Provide: **Receipts/Letter with Date, Amount Paid**
50) Excessive Medical Expenses Paid YES NO
Must itemize and expenses are in excess of 7.5% of AGI
51) Does everyone have health care coverage YES NO
Health Insurance from Marketplace 1095-A YES NO
Do you authorize sharing your tax information with the Maryland Heath Exchange? YES NO
52) Long-Term Care Insurance Paid - statements YES NO
53) Daycare Expenses Paid - Need statements YES NO
54) College Tuition Expenses Paid Form 1098-T YES NO
Provide: **Statements for Tuition, Housing, & Books Paid**.
Student Name: _____ Full-Time or Part-Time
55) Purchase a New (not used) Vehicle in 2025 YES NO
Have a loan on the vehicle? Form 1098-VLI YES NO
56) Purchase an Electric Vehicle before 10/1/25 YES NO
Year, Make, Model, VIN, Date, Dealer Time of Sale Report
Purchase Electric Vehicle Charger - Invoice YES NO
57) Energy-Efficient Improvements - Invoice YES NO
Provide Document with manufacturer's certification No.
58) Pay 2025 Estimated Taxes YES NO
For each payment provide: **Paid To, Date Paid, Amount**
59) Give a Gift of $19,000 or more to a person? YES NO
Provide: **Donee Name, Relationship, Address & Amount**