

Taxpayer Information	Spouse Information
Last name	Last name
First name	First name
Middle Initial.....	Middle Initial.....
Suffix.....	Suffix.....
Social security number	Social security number
Occupation	Occupation.....
Work phone	Work phone.....
Ext ...	Ext ...
Cell phone	Cell phone
E-mail address.....	E-mail address
Date of birth	Date of birth
Address	Apartment number
City	State.....
	ZIP Code.....
Home phone.....	Fax number

Dependent Information

First name	MI	Social Security Number	Date	Months Lived	Child Care
Last name	Suffix	Relationship	of Birth	with Taxpayer	Expense

Child and Dependent Care Provider Expenses

Name	Address	ID Number	Amount Paid

Education Tuition and Fees


Attach all Form 1098-Ts and a list of your qualified education expenses.

Student Loan Interest Paid

Enter total 2025 qualified student loan interest.....

1040 Tax Drop-Off Checklist – Tax Year: _____

Item	Changed?	Notes (If Yes)
Address	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____ City _____ Zip _____
Phone / Email	<input type="checkbox"/> Yes <input type="checkbox"/> No	Phone: _____ Email: _____
Bank Info for Refund	<input type="checkbox"/> Yes <input type="checkbox"/> No	Routing #: _____ Acct #: _____
Driver’s License Info	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse Provide Copy if updated
Dependents	<input type="checkbox"/> Yes <input type="checkbox"/> No	Provide SSN/DOB/Relation _____
Marital Status	<input type="checkbox"/> Yes <input type="checkbox"/> No	Provide details of change _____
Any crypto activity last year?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> No – Provide 1099-B or similar document
Health Exchange (1095-A)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> No – Provide 1095-A
Sold/refinanced/abandoned a home?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> No – Provide Closing Statement for home sold
College tuition for anyone in household?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> No – Provide 1098-T or similar document
Child needs a tax return? (\$200–\$350)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> No – Provide name, income sources, & relevant info
Solo-K / SEP / SIMPLE IRA / 401(k)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> No – Company/Amount: _____/_____
Foreign bank account ownership?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> No – Total balances ever \$10K+? _____
Did all dependents on your return live with you at least ½ of the year?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> No – If NO, who doesn’t meet this qualification?
Estimates: Fed/State estimated payments?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> No – Provide dates and amounts of payments

 Include These Documents when you turn in

☐ Signed Engagement Agreement ☐ Prior Year Return (if we didn’t prepare it) ☐ All W-2s, 1099s, 1098s, and other tax doc

NOTES:
