

Existing Client Form

Your Name		Spouse's Name	
Occupation		Occupation	

Any Changes to your Home Address? NO YES

If YES, please update: _____

Communication Preference

Taxpayer Phone: _____ Email: _____ Preferred Contact:

Taxpayer

Spouse's Phone: _____ Email: _____ Spouse

Bank Information: New for 2025-The IRS is no longer issuing paper refund checks. All refunds must be made by Direct Deposit.

Any Changes to your personal banking information? NO YES (update Below)

<input type="checkbox"/> Checking Account OR	Routing Number:	Account Number:
<input type="checkbox"/> Saving Account		

1. Did you receive, sell, exchange, gift, or otherwise dispose of any digital asset or financial interest in digital asset such as **cryptocurrency**? **FORM 1099-DA** YES NO

2. Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country. Did the aggregate value of your **foreign accounts exceed \$10,000** at any time in 2025? YES NO

Check your Filing Status Below

Any Changes to your filing status for 2025? (single, Married Joint, Married Separate) _____

Can you be claimed as a dependent on anyone else's tax return for 2025? NO YES

Completed Return Options

Select one of the following:

Tax Return	Supporting Documents
<input type="checkbox"/> Send to my Portal	<input type="checkbox"/> Send to my Portal and shred originals
<input type="checkbox"/> Pickup at Benton Tax	<input type="checkbox"/> Pickup at Benton Tax

Claiming Dependents and Children

Dependent/Children <small>*As Written on Social Security Card* (first, Middle initial, last name)</small>	Social Security Number (only if New Dependent)	Date of Birth (Only if New Dependent)	Relationship to You	Daycare Receipts	# of Months lived in your home this year
Any children that live in your Home that you will not be claiming in 2025?					

VERIFY THIS INFORMATION BY SIGNING HERE X _____ Date: _____

Please complete the Tax Questionnaire below

General	YES <input type="checkbox"/>	NO <input type="checkbox"/>	<p>1. Did you receive an Identity protection pin from the IRS? (A new PIN is required each year)</p> <p style="padding-left: 20px;">○ IP PIN # _____</p> <p>2. Did you have any debts canceled or forgiven in 2025? Such as a Credit Card FORM 1099-C</p>																				
2025 ESTIMATES	YES <input type="checkbox"/>	NO <input type="checkbox"/>	<p>3. Did you make any estimated payments towards your 2025 Taxes? Fill out table below</p> <p>4. If you have an overpayment of 2025 taxes, do you want the refund applied to your 2026 estimated taxes?</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th colspan="2" style="background-color: #e1f5fe;">Federal</th> <th colspan="2" style="background-color: #e1f5fe;">State</th> </tr> </thead> <tbody> <tr> <td style="width: 25%;">Date:</td> <td style="width: 25%;">Paid: \$</td> <td style="width: 25%;">Date:</td> <td style="width: 25%;">Paid: \$</td> </tr> <tr> <td>Date:</td> <td>Paid: \$</td> <td>Date:</td> <td>Paid: \$</td> </tr> <tr> <td>Date:</td> <td>Paid: \$</td> <td>Date:</td> <td>Paid: \$</td> </tr> <tr> <td>Date:</td> <td>Paid: \$</td> <td>Date:</td> <td>Paid: \$</td> </tr> </tbody> </table>	Federal		State		Date:	Paid: \$	Date:	Paid: \$	Date:	Paid: \$	Date:	Paid: \$	Date:	Paid: \$	Date:	Paid: \$	Date:	Paid: \$	Date:	Paid: \$
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DEPENDENTS	YES <input type="checkbox"/>	NO <input type="checkbox"/>	<p>5. Did your children attend Daycare? Receipts are needed, even if through payroll deduction. Receipts need to include name, address, and amount paid.</p> <p>6. Did any children have unearned income (such as interest, dividends, capital gains) above \$1350 for 2025?</p> <p>7. Was your dependent between the age of 19-23 in 2025? *Were they a full time Student? _____ OR was their income amount under \$5200? _____</p>																				
EDUCATION	YES <input type="checkbox"/>	NO <input type="checkbox"/>	<p>8. Did you have any educational expenses on behalf of yourself, spouse, or a dependent? FORM 1098-T</p> <p>9. Did anyone in your family receive a scholarship or grant of any kind? College account transcript needed</p> <p>10. Did you make any withdrawals from an education savings or 529 plan? Form 1099-Q</p> <p>11. Did you make any contributions to a 529 plan in 2025? Provide end-of-year statement</p> <p>12. Did you pay student loan interest? FORM 1098-E</p> <p>13. Are you a K-12 teacher, counselor, or principal and paid classroom expenses? Total paid \$ _____</p>																				
NEW LAW	YES <input type="checkbox"/>	NO <input type="checkbox"/>	<p>14. Did you receive qualified tips reported on form W-2 or a statement provided by your employer? ○ Provide your 12/31 (last) paystub for 2025</p> <p>15. Did you receive overtime pay reported on your W-2 or a statement provided by your employer? ○ Provide your 12/31 (last) paystub of 2025</p> <p>16. Did you purchase a new passenger vehicle for personal use in 2025? Do the following questions apply to the vehicle? VIN Number: _____</p> <table style="margin-left: 20px;"> <tr> <td>○ Was the final assembly completed in the U.S?</td> <td>YES</td> <td>NO</td> </tr> <tr> <td>○ Is the gross Vehicle weight under 14,000 pounds?</td> <td>YES</td> <td>NO</td> </tr> <tr> <td>○ The vehicle was not purchased with a lease?</td> <td>YES</td> <td>NO</td> </tr> <tr> <td>○ Was the vehicle used to secure the loan?</td> <td>YES</td> <td>NO</td> </tr> </table> <p>17. If you have a child born between 1/1/25-12/31/25, who may be eligible for the Federal <i>Trump Account</i> (a new tax advantage savings account seeded with \$1,000) would you like to enroll them in the pilot program set to activate in July 2026? FORM 4547</p> <p>18. Do you have any children not born in 2025 but under the age of 18 and would like to set up a Trump Account? (a tax advantage savings account- Does not qualify for \$1000 seed investment)</p>	○ Was the final assembly completed in the U.S?	YES	NO	○ Is the gross Vehicle weight under 14,000 pounds?	YES	NO	○ The vehicle was not purchased with a lease?	YES	NO	○ Was the vehicle used to secure the loan?	YES	NO								
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○ Was the vehicle used to secure the loan?	YES	NO																					
ENERGY EFFICIENT	YES <input type="checkbox"/>	NO <input type="checkbox"/>	<p>19. Did you make any energy efficient improvement to your home in 2025? Such as windows, exterior doors, insulation, furnace, air conditioner, water heater, or central air system. ○ Must meet IRS efficiency standards to qualify. Provide Receipts _____</p> <p>20. Did you install any clean energy property in 2025? Such as solar panels, solar water, geothermal heat pumps, wind turbines, fuel cells, or battery storage. Provide Receipts _____</p>																				
HEALTH CARE	YES <input type="checkbox"/>	NO <input type="checkbox"/>	<p>21. Did any member of your household have healthcare coverage through the Marketplace? FORM 1095-A</p> <p>22. Did you pay for medical insurance? (Not on W-2 or through social security) Amount for year \$ _____</p> <p>23. Are you enrolled in a HSA account? FORM 1099-SA. Is this a self or family plan? (circle one) Withdrawals?</p> <p>24. Did you pay any long-term care premiums for yourself or spouse? T \$ _____ S \$ _____</p>																				
ITEMIZED DEDUCTIONS	YES <input type="checkbox"/>	NO <input type="checkbox"/>	<p>25. Did you pay real estate property taxes or personal taxes during 2025? Provide Receipts</p> <p>26. Did you pay mortgage interest in 2025? FORM 1098</p> <p>27. Did you make any cash donations to charity in 2025? Provide receipts/ documentation</p> <p>28. Did you make any non-cash Donations to charity in 2025 such as clothes, furniture, ect.. Provide receipts</p>																				