

New Client Form: We require a Copy of your 2024 Tax Return

Your Name		Spouse's Name	
SS#		SS#	
Date of Birth		Date of Birth	
Occupation		Occupation	
Home Address:		School District: _____	
City:	State:	Zip Code:	County:
Do you live within the city limits of Kansas City? YES or NO		Provide Dates if not a resident for all 12 months: _____	
Did you move into or out of a state this year? YES or NO		Provide Dates of move: _____	

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.

Name of Bank: _____

<input type="checkbox"/> Checking Account	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

<input type="checkbox"/> SINGLE	<input type="checkbox"/> MARRIED FILING JOINTLY	<input type="checkbox"/> MARRIED FILING SEPARATELY Date Separated: _____
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- Can you be claimed on your parent's tax return or on anyone else's this year? **Yes No**

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*</small> (first, Middle, last name)	Social Security Number	Date of Birth	Relationship to You	Daycare Receipts	# of Months lived in your home in 2025
Any children that live in your Home that you will not be claiming in 2025?					

VERIFY THIS INFORMATION BY SIGNING HERE X _____

2025 TAX Questionnaire

General	<u>YES</u> <input type="checkbox"/>	<u>NO</u> <input type="checkbox"/>	<p>1. Did you receive an Identity protection pin (IP PIN) from the IRS? (A new PIN is required each year)</p> <p style="margin-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	<u>YES</u> <input type="checkbox"/>	<u>NO</u> <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: 5px;"> <thead> <tr> <th colspan="2" style="text-align: center;">Federal</th> <th colspan="2" style="text-align: center;">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	<u>YES</u> <input type="checkbox"/>	<u>NO</u> <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	<u>YES</u> <input type="checkbox"/>	<u>NO</u> <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	<u>YES</u> <input type="checkbox"/>	<u>NO</u> <input type="checkbox"/>	<p>14. Did you receive qualified tips reported on form W-2 or a statement provided by your employer? ○ Provide 12/31 or last paystub of 2025</p> <p>15. Did you receive overtime pay reported on your W-2 or a statement provided by your employer? ○ Provide 12/31 or 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="width: 100%; margin-left: 20px;"> <tr> <td style="width: 60%;">○ Was the final assembly completed in the U.S?</td> <td style="width: 10%;">YES</td> <td style="width: 10%;">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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ENERGY EFFICIENT	<u>YES</u> <input type="checkbox"/>	<u>NO</u> <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	<u>YES</u> <input type="checkbox"/>	<u>NO</u> <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	<u>YES</u> <input type="checkbox"/>	<u>NO</u> <input type="checkbox"/>	<p>25. Did you pay real estate property taxes or personal taxes during 2025? Provide Receipts (Paid in JAN 2026 will not apply for the 2025 tax year.)</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 & Values</p>																				