

## Existing Client Form

Your Name		Spouse's Name	
Occupation		Occupation	
Any Changes to your Home Address?		NO	YES
If YES, please update:		When:	
<b>Communication Preference-</b>		<input type="checkbox"/> Phone	<input type="checkbox"/> Email

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)**

□ Checking Account <b>OR</b> □ Saving Account	Routing Number:	Account Number:
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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**  
 Send to my Portal  
 Pickup at Benton Tax

**Supporting Documents**  
 Send to my Portal and shred originals  
 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 <b>(only if New Dependent)</b>	Date of Birth <b>(Only if New Dependent)</b>	Relationship to You	Daycare Receipts	# of Months lived in your home this year
<b>Any children that live in your Home that you will not be claiming in 2025?</b>					

VERIFY THIS INFORMATION BY SIGNING HERE    X \_\_\_\_\_ Date: \_\_\_\_\_

# Please complete the Tax Questionnaire below

General	<b>YES</b> <input type="checkbox"/> <b>NO</b> <input type="checkbox"/>	<p>1. Did you receive an Identity protection pin from the IRS? (A new PIN is required each year)  <input type="radio"/> IP PIN # _____</p> <p>2. Did you have any debts canceled or forgiven in 2025? Such as a Credit Card <b>FORM 1099-C</b></p>																				
2025 ESTIMATES	<b>YES</b> <input type="checkbox"/> <b>NO</b> <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; text-align: center;"> <thead> <tr> <th colspan="2">Federal</th> <th colspan="2">State</th> </tr> </thead> <tbody> <tr> <td>Date:</td> <td>Paid: \$</td> <td>Date:</td> <td>Paid: \$</td> </tr> </tbody> </table>	Federal		State		Date:	Paid: \$														
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DEPENDENTS	<b>YES</b> <input type="checkbox"/> <b>NO</b> <input type="checkbox"/>	<p>5. Did your children attend Daycare? <b>Receipts are needed</b>, 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?  <input type="radio"/> Were they a full time Student? _____ <b>OR</b> was their income amount under \$5200? _____</p>																				
EDUCATION	<b>YES</b> <input type="checkbox"/> <b>NO</b> <input type="checkbox"/>	<p>8. Did you have any educational expenses on behalf of yourself, spouse, or a dependent? <b>FORM 1098-T</b></p> <p>9. Did anyone in your family receive a scholarship or grant of any kind? <b>College account transcript needed</b></p> <p>10. Did you make any withdrawals from an education savings or 529 plan? <b>Form 1099-Q</b></p> <p>11. Did you make any contributions to a 529 plan in 2025? <b>Provide end-of-year statement</b></p> <p>12. Did you pay student loan interest? <b>FORM 1098-E</b></p> <p>13. Are you a K-12 teacher, counselor, or principal and paid classroom expenses? <b>Total paid \$</b> _____</p>																				
NEW LAW	<b>YES</b> <input type="checkbox"/> <b>NO</b> <input type="checkbox"/>	<p>14. Did you receive qualified tips reported on form W-2 or a statement provided by your employer?  <input type="radio"/> <b>Provide your 12/31 (last) paystub for 2025</b></p> <p>15. Did you receive overtime pay reported on your W-2 or a statement provided by your employer?  <input type="radio"/> <b>Provide your 12/31 (last) paystub of 2025</b></p> <p>16. Did you purchase a 2025 passenger vehicle for personal use last year? If yes, answer the following:  <b>VIN Number:</b> _____ <b>Make/Model:</b> _____ <b>Year:</b> _____  <input type="radio"/> Was the final assembly completed in the U.S? YES NO  <input type="radio"/> Is the gross Vehicle weight under 14,000 pounds? YES NO  <input type="radio"/> What was the <b>loan origination Date</b>? _____  <input type="radio"/> <b>Outstanding principal</b> on 12/31/25 \$ _____ <b>Total Interest paid</b> in 2025 \$ _____</p> <p>17. If you have a child born between 1/1/25-12/31/25, who may be eligible for the Federal <b>Trump Account</b> (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? <b>FORM 4547</b></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>																				
ENERGY EFFICIENT	<b>YES</b> <input type="checkbox"/> <b>NO</b> <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.  <input type="radio"/> Must meet IRS efficiency standards to qualify. <b>Provide Receipts</b> _____</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. <b>Provide Receipts</b> _____</p>																				
HEALTH CARE	<b>YES</b> <input type="checkbox"/> <b>NO</b> <input type="checkbox"/>	<p>21. Did any member of your household have healthcare coverage through the Marketplace? <b>FORM 1095-A</b></p> <p>22. Did you pay for medical insurance? (Not on W-2 or through social security) <b>Amount for year \$</b> _____</p> <p>23. Are you enrolled in a HSA account? <b>FORM 1099-SA</b>. Is this a self or family plan? (circle one) Withdrawals?  <input type="radio"/> T \$ _____ <input type="radio"/> S \$ _____</p> <p>24. Did you pay any long-term care premiums for yourself or spouse? <b>T \$</b> _____ <b>S \$</b> _____</p>																				
ITEMIZED DEDUCTIONS	<b>YES</b> <input type="checkbox"/> <b>NO</b> <input type="checkbox"/>	<p>25. Did you pay real estate property taxes or personal taxes during 2025? <b>Provide Receipts</b></p> <p>26. Did you pay mortgage interest in 2025? <b>FORM 1098</b></p> <p>27. Did you make any cash donations to charity in 2025? <b>Provide receipts/ documentation</b></p> <p>28. Did you make any non-cash Donations to charity in 2025 such as clothes, furniture, ect.. <b>Provide receipts</b></p>																				