

## **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	<input type="checkbox"/> Phone	<input type="checkbox"/> Email	
Taxpayer Phone: _____	Email: _____	Preferred Contact:	
Spouse's Phone: _____	Email: _____	<input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse	

<b>Bank Information: New for 2025-The IRS is no longer issuing paper refund checks. All refunds must be made by Direct Deposit.</b>			
Name of Bank: _____			
<input type="checkbox"/> Checking Account <input type="checkbox"/> Saving Account	Routing Number: _____	Account Number: _____	

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

<b>Check your Filing Status Below</b>			
<input type="checkbox"/> SINGLE	<input type="checkbox"/> MARRIED FILING JOINTLY	<input type="checkbox"/> MARRIED FILING SEPARATELY	
		Date Separated: _____	

- Can you be claimed on your parent's tax return or on anyone else's this year?   Yes      No

<b>Completed Return Options</b>					
Select one of the following	<b>Tax Return</b>	<b>Supporting Documents</b>			
	<input type="checkbox"/> Send to my Portal <input type="checkbox"/> Pickup at Benton Tax	<input type="checkbox"/> Send to my Portal and shred originals <input type="checkbox"/> Pickup at Benton Tax			

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

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

## 2025 TAX Questionnaire

General	<b>YES</b> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>NO</b> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<p>1. Did you receive an Identity protection pin (IP 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"/> <input type="checkbox"/> <input type="checkbox"/>	<b>NO</b> <input type="checkbox"/> <input type="checkbox"/> <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;"> <thead> <tr> <th colspan="2" style="text-align: center; background-color: #d3d3d3;">Federal</th> <th colspan="2" style="text-align: center; background-color: #d3d3d3;">State</th> </tr> <tr> <th style="text-align: center;">Date:</th> <th style="text-align: center;">Paid: \$</th> <th style="text-align: center;">Date:</th> <th style="text-align: center;">Paid: \$</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><u>Date:</u></td> <td style="text-align: center;"><u>Paid: \$</u></td> <td style="text-align: center;"><u>Date:</u></td> <td style="text-align: center;"><u>Paid: \$</u></td> </tr> <tr> <td style="text-align: center;"><u>Date:</u></td> <td style="text-align: center;"><u>Paid: \$</u></td> <td style="text-align: center;"><u>Date:</u></td> <td style="text-align: center;"><u>Paid: \$</u></td> </tr> <tr> <td style="text-align: center;"><u>Date:</u></td> <td style="text-align: center;"><u>Paid: \$</u></td> <td style="text-align: center;"><u>Date:</u></td> <td style="text-align: center;"><u>Paid: \$</u></td> </tr> <tr> <td style="text-align: center;"><u>Date:</u></td> <td style="text-align: center;"><u>Paid: \$</u></td> <td style="text-align: center;"><u>Date:</u></td> <td style="text-align: center;"><u>Paid: \$</u></td> </tr> </tbody> </table>	Federal		State		Date:	Paid: \$	Date:	Paid: \$	<u>Date:</u>	<u>Paid: \$</u>														
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DEPENDENTS	<b>YES</b> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>NO</b> <input type="checkbox"/> <input type="checkbox"/> <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="checkbox"/> Were they a full time Student? _____ <b>OR</b> was their income amount under \$5200? _____</p>																								
EDUCATION	<b>YES</b> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>NO</b> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <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"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>NO</b> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <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 12/31 or last paystub of 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 12/31 or last paystub of 2025</b></p> <p>16. Did you purchase a 2025 passenger vehicle for personal use in 2025? 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"/> <b>Loan origination Date:</b> _____  <input type="radio"/> <b>Outstanding principal on 12/31/2025 \$</b> _____ <b>Total interest paid in 2025 \$</b> _____</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"/> <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>																								
HEALTH CARE	<b>YES</b> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>NO</b> <input type="checkbox"/> <input type="checkbox"/>	<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>																								
ITEMIZED DEDUCTIONS	<b>YES</b> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>NO</b> <input type="checkbox"/> <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? _____</p> <p>24. Did you pay any long-term care premiums for yourself or spouse? <b>T \$</b> _____ <b>S \$</b> _____</p> <p>25. Did you pay real estate property taxes or personal taxes during 2025? <b>Provide Receipts</b>  <input type="checkbox"/> (Paid in JAN 2026 will not apply for the 2025 tax year.)</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 &amp; Values</b></p>																								