

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: City: _____ State: _____ Zip Code: _____		School District: _____ 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
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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 <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

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

- ☐ 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 *As Written on Social Security Card* (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	YES <input type="checkbox"/>	NO <input type="checkbox"/>	1. Did you receive an Identity protection pin (IP PIN) from the IRS? (A new PIN is required each year) ○ IP PIN _____ 2. Did you have any debts canceled or forgiven in 2025? Such as a credit card. FORM 1099-C																				
2025 ESTIMATES	YES <input type="checkbox"/>	NO <input type="checkbox"/>	3. Did you make any estimated payments towards your 2025 Taxes? Fill out table below 4. If you have an overpayment of 2025 taxes, do you want the refund applied to your 2026 estimated taxes? <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="text-align: center;">Date: _____</td><td style="text-align: center;">Paid: \$ _____</td><td style="text-align: center;">Date: _____</td><td style="text-align: center;">Paid: \$ _____</td></tr> <tr> <td style="text-align: center;">Date: _____</td><td style="text-align: center;">Paid: \$ _____</td><td style="text-align: center;">Date: _____</td><td style="text-align: center;">Paid: \$ _____</td></tr> <tr> <td style="text-align: center;">Date: _____</td><td style="text-align: center;">Paid: \$ _____</td><td style="text-align: center;">Date: _____</td><td style="text-align: center;">Paid: \$ _____</td></tr> <tr> <td style="text-align: center;">Date: _____</td><td style="text-align: center;">Paid: \$ _____</td><td style="text-align: center;">Date: _____</td><td style="text-align: center;">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"/>	5. Did your children attend Daycare? Receipts are needed , even if through payroll deduction. Receipts need to include name, address, and amount paid. 6. Did any children have unearned income (such as interest, dividends, capital gains) above \$1350 for 2025? 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? _____																				
EDUCATION	YES <input type="checkbox"/>	NO <input type="checkbox"/>	8. Did you have any educational expenses on behalf of yourself, spouse, or a dependent? FORM 1098-T 9. Did anyone in your family receive a scholarship or grant of any kind? College account transcript needed 10. Did you make any withdrawals from an education savings or 529 plan? Form 1099-Q 11. Did you make any contributions to a 529 plan in 2025? Provide end-of-year statement 12. Did you pay student loan interest? FORM 1098-E 13. Are you a K-12 teacher, counselor, or principal and paid classroom expenses? Total paid \$ _____																				
NEW LAW	YES <input type="checkbox"/>	NO <input type="checkbox"/>	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 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 16. Did you purchase a 2025 passenger vehicle for personal use in 2025? If yes, answer the following: VIN Number: _____ Make/Model: _____ Year: _____ ○ Was the final assembly completed in the U.S? YES NO ○ Is the gross Vehicle weight under 14,000 pounds? YES NO ○ Loan origination Date: _____ ○ Outstanding principal on 12/31/2025 \$ _____ Total interest paid in 2025 \$ _____ 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 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)																				
ENERGY EFFICIENT	YES <input type="checkbox"/>	NO <input type="checkbox"/>	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 _____ 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 _____																				
HEALTH CARE	YES <input type="checkbox"/>	NO <input type="checkbox"/>	21. Did any member of your household have healthcare coverage through the Marketplace? FORM 1095-A 22. Did you pay for medical insurance? (Not on W-2 or through social security) Amount for year \$ _____ 23. Are you enrolled in a HSA account? FORM 1099-SA . Is this a self or family plan? (circle one) Withdrawals? ____ 24. Did you pay any long-term care premiums for yourself or spouse? T \$ _____ S \$ _____																				
ITEMIZED DEDUCTIONS	YES <input type="checkbox"/>	NO <input type="checkbox"/>	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.) 26. Did you pay mortgage interest in 2025? FORM 1098 27. Did you make any cash donations to charity in 2025? Provide receipts/ documentation 28. Did you make any non-cash Donations to charity in 2025 such as clothes, furniture, ect.. Provide receipts & Values																				