

# Individual Tax Worksheet – Returning Client

## Client Information

Taxpayer Name: \_\_\_\_\_ Cell Phone Number: \_\_\_\_\_

Spouse/Partner Name: \_\_\_\_\_ Cell Phone Number: \_\_\_\_\_

Current Address: \_\_\_\_\_

Did you move this year? Y N Date of move: \_\_\_\_\_ School district? \_\_\_\_\_

Taxpayer Email \_\_\_\_\_ Spouse/Partner Email: \_\_\_\_\_

Did you exchange digital assets (i.e. Bitcoin)? Y N Do you have funds in a foreign bank account? Y N

Did you have **overtime** in 2025? Y N If **yes**, please provide a copy of your last pay stub.

Would you like to set up a Trump Account for your child under the age of 18? Y N

**Note: The IRS no longer issues paper refund checks, so we'll need your bank account information to process the refund by direct deposit.**

Bank: \_\_\_\_\_ Routing #: \_\_\_\_\_ Account # \_\_\_\_\_ Checking \_\_\_ Savings \_\_\_\_\_

Did you pay all FEDERAL estimates? Y N

Did you pay all STATE estimates? Y N

	Amount	Date	Check #
Q1			
Q2			
Q3			
Q4			

	Amount	Date	Check #
Q1			
Q2			
Q3			
Q4			

## Children in school Expenditures:

K-12 Tuition, Books, Extracurriculars: \$ \_\_\_\_\_

College Education Expenses: Y N

Educator expense: \$ \_\_\_\_\_ (up to \$500 for K-12 public school teachers only)

**Names of Dependents you are claiming:** \_\_\_\_\_

\_\_\_\_\_

NEW Dependent – Name: \_\_\_\_\_ Rel: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_

**(MUST include a copy of the Social Security card for new dependents.)**

Do you have custody of the dependents? Y N (If **No**, explain below.)

**We will electronically file your tax return with the IRS and State. How would you like your copy of the tax return?**

Signature Method: In-Person \_\_\_\_\_ Electronic \_\_\_\_\_

Tax Return Copy: Paper \_\_\_\_\_ Electronic \_\_\_\_\_

Pick up location: Osage \_\_\_\_\_ Riceville \_\_\_\_\_ Cresco \_\_\_\_\_ Nashua \_\_\_\_\_