

FIRST CHOICE TAX SERVICE - TAX YEAR 2025

RETURNING CLIENTS

Full Name: _____ Phone Number: _____
Email Address: _____

PLEASE FILL OUT AND INCLUDE WITH YOUR DOCUMENTS/PAPERWORK

There is a separate worksheet to be filled out if you are **Self-Employed(1099-NEC)** or have **Rental Property**

A checklist/worksheets will be provided upon your request or can be obtained on the website:

www.firstchoicetaxes.com

******* NEW TAX LAW - If you have Children Under 18 *******

PLEASE SEE "TRUMP SAVINGS DISCLOSURE" Must be signed BEFORE tax return can be prepared

Copy of Driver's License for Taxpayer and Spouse (if not already on file or expired in 2025)
 Marital Status as of 12-31-2025 _____
 Were you paid overtime in 2025? NO YES If yes, please provide a copy of your last paystub
 Were you paid tips in 2025? NO YES If yes, please provide a statement from your employer
 Identity Protection PIN, if one has been issued to you, your spouse, or your dependent by the IRS _____
 Any change to dependents? NO YES If yes, please explain _____
 Did you move in 2025? If yes, Date moved: _____ New Address _____
 Traditional IRA: Total contributions made for Tax Year 2025 \$ _____
 Can you be claimed as a dependent by your parents? Yes No
 Did you purchase a NEW car in 2025? If yes, please provide the VIN# _____

Record of estimated federal tax payments (Form 1040-ES) and state tax payments (Form 760-ES)

Date Paid	Federal	State

BANK INFORMATION: *** If this box is not filled out COMPLETELY a voucher will be provided to mail in balance due and any refund will be mailed by check to the address on file ***

REFUND - Direct Deposit? YES NO (have my refund sent by mail)

TAXES DUE - Deduct from bank account? YES (only after paperwork is signed) NO, I will mail a check

ESTIMATED TAXES for 2026 - Deduct from bank account provided? YES NO

Same as previous year Yes No **If no please provide the following:**

New Bank Information: Name of Bank: _____ Checking Savings

Bank Routing Number#: _____ Bank Account #: _____

NOTES FOR SANDY _____

Tax Prep Checklist

Employed

- Forms W-2
- Paid Overtime - Copy of last pay stub

Unemployed

- Unemployment (1099-G)

Self-Employed - Worksheet (we will provide) filled out and included with your paperwork

- Forms 1099-MISC, 1099-NEC, 1099-K, Sch K-1 and income records to verify amounts not reported

Rental Income - Worksheet (we will provide) filled out and included with your paperwork

- Records of income and expenses (Worksheet provided if needed)
- Rental asset information (cost, date placed in service, etc.) for depreciation

Other Income & Losses

- Received Tip Income NO YES If yes, amount **NOT** included in W2/1099 \$ _____
- Retirement Income/Pension/IRA/annuity income (1099-R)
- Traditional IRA basis (i.e., amounts you contributed to the IRA that were already taxed)
- Social security/RRB income (SSA-1099, RRB-1099)
- Savings & Investments or Dividends Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)
- Dates of purchases & your cost basis in property you sold (if basis is not reported on 1099-B)
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Transactions involving cryptocurrency (Virtual currency)
- Stock Incentives/Stock Options given by Employer
- Gambling income (W-2G or records showing income, as well as expense records)
- Jury duty records, Hobby income and expenses, Prizes and awards, Trust income
- State tax refund, Royalty income 1099-MISC, Any other 1099s received

Home Ownership

- Forms 1098 or other mortgage interest statements
- Real estate and personal property tax records
- Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)

Charitable Donations

- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts of miles driven for charitable or medical purposes

Types of Deductions

- Medical Expenses - Amounts paid for healthcare, insurance, and to doctors, dentists, and hospitals
- Health Insurance: Form 1095-A if your insurance plan is through the Marketplace (Exchange)
- Childcare expenses (including the provider's address & tax ID number)
- Expenses paid through a dependent care flexible spending account at work
- Invoice showing amount of vehicle sales tax paid and / or personal property tax on vehicles
- Received the First Time Homebuyers Credit in 2008? YES NO
- Do you have a "Capital Loss Carryover" on Form 1040 Schedule D? YES NO
- Electric Vehicle Purchased (provide date purchased, Veh ID#, make and model)

Educational Expenses

- Forms 1098-T from educational institutions
- Forms 1099-Q for distributions from education savings plans
- Records of qualified educational expenses/scholarships not included on 1098-T
- Forms 1098-E if you paid student loan interest
- K-12 Educator expenses
- Payments InVest 529 Plan - Child's Name & Amount Contributed

Retirement & Other Savings

- Form 5498-SA showing HSA contributions
- Form 5498 showing IRA contributions