FIRST CHOICE TAX SERVICE - TAX YEAR 2025
NEW CLIENTS
(Please provide a copy of tax return from previous year)

*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

Taxpayer Name:_________________________________DOB _________________ Occupation_______________
SS#___________________________ ☐ Full-Time Student ☐ Legally Blind ☐ Totally/Permanently Disabled
Spouse Name:_________________________________DOB _________________ Occupation_______________
SS#___________________________ ☐ Full-Time Student ☐ Legally Blind ☐ Totally/Permanently Disabled

List the names of **EVERYONE** who lived with you & **ANYONE** you supported that did not live with you

Name (Last, First)	Soc Sec #	Date of Birth	(Son, Daughter, Parent, Etc)

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

PLEASE SEE "TRUMP SAVINGS DISCLOSURE" Must be signed <u>BEFORE</u> tax return can be prepared

☐ Copy of Driver's License for Taxpayer and Spouse
☐ 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: *** ***<u>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</u>*** ***

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

Bank Information: Name of Bank:______________________________ ☐ Checking ☐ Savings
Bank Routing Number#: ____________________ Bank Account #:___________________________________

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

First Choice Tax Service, LLC 804.822.5100 sandy@firstchoicetaxes.com