



## 2025 – TAX RETURN DROP-OFF INFORMATION FORM

Print Name \_\_\_\_\_ Signature \_\_\_\_\_

Email Address (Prefer to receive emails ) \_\_\_\_\_ Secondary Email Address \_\_\_\_\_

Primary Phone # (Prefer to receive calls ) \_\_\_\_\_ Secondary Phone # \_\_\_\_\_

- |   | <u>Yes</u>               | <u>No</u>                |
|---|--------------------------|--------------------------|
| <b>1) Did anyone listed on your return (you, spouse, dependents) use the <u>Government Marketplace</u> for health insurance during 2025?</b><br>If yes, you must provide us with <b>Form 1095-A</b> .                       | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>2) Are you dropping off tax documents for additional parties (i.e. parents, a child, In-laws, etc.) that will require a separate tax return to be filed?</b><br>If yes, please list their names below:<br>_____<br>_____ | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>3) Did your marital status change during 2025?</b><br>If yes, explain: _____   | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>4) Did you move during 2025? If so, please provide your new address and date of move</b> _____<br>_____  | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>5) Are you claiming any dependents for 2025? If no, skip to question #6. If yes, complete A, B and C.</b>  | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>A) Is there any change to the status of any dependents?</b><br>If yes, explain: _____<br>If you are adding a new dependent, please provide a <u>copy</u> of the birth certificate and social security card.              | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>B) Did all dependents live with you for more than half of 2025?</b><br>If no, explain: _____   | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>C) Did you provide over half the support for all your dependents?</b><br>If no, explain: _____   | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Can another person qualify to claim any of your dependents?</b><br>If yes, explain: _____  | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>E) Did you pay anyone for childcare services?</b><br>If yes, please provide receipt with <b>amount, EIN/SSN and address</b> .  | <input type="checkbox"/> | <input type="checkbox"/> |

6) **If you receive a refund, would you like a direct deposit?** Yes  No   
 Banking information **DID NOT** change   
 If your banking information **changed**, please provide the following:  
 Bank Name: \_\_\_\_\_  
 Routing Number: \_\_\_\_\_  
 Account Number: \_\_\_\_\_  
 Account Type (Checking or Savings): \_\_\_\_\_

**Are you claiming an education credit?** (If yes, you must provide us with the Form 1098-T, Tuition Statement from the educational institution and the student's account statement from the college showing the payments made.)

7) **At any time during 2025, did you: (a) receive cryptocurrency as a reward, award, or compensation; or (b) sell, exchange, gift, or otherwise dispose of a digital asset (such as bitcoin), Foreign Assets or Foreign income?**

8) **Did you make any contributions to an IRA/HSA/529 Plan?**

9) **Did you make qualifying energy-efficient improvements to your home, which may include items such as windows, solar panels, water heaters, or furnaces?**    
 If yes, please provide invoice(s) with make, model, and amount paid

10) **Did you purchase a new vehicle?** (If yes, please provide Year, Make, Model)

11) **Did you receive income from renting a house or property?**

12) **Did you receive income from self-employment?**

13) **Did you receive a 1099-K from eBay, etc. related to selling property online?**

14) **Did you receive overtime pay in 2025.** (If yes, please include last paystub of 2025)

15)

16) **If you made estimated tax payments for 2025, please provide the dates and amounts paid below.**

FEDERAL (Date/Amount)	STATE (Date/Amount)	LOCAL (Date/Amount)
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____
4. _____	4. _____	4. _____

17) **Please provide any significant changes that we should be aware of for 2026:**  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Preferred method to communicate your return is ready for pick up:**

Call  Email

**Preferred method of pick up:**  PICK UP  MAIL  ELECTRONIC COPY

**Preferred Pick Up Location:**  Denver  Willow Street