SUTTON FINANCIAL SERVICES

333 GELLERT BLVD., STE 247 DALY CITY, CA 94015 | TEL: 650 - 755 - 1040 | FAX: 650 - 887 - 1500

2025 – TAX FILINGS   DATE: _____

NAME: _____

PHONE: _____ - _____ - _____

EMAIL: _____

SPOUSE'S EMAIL: _____

Under Executive Order 14247 – the IRS code delay a printed refund check by up to six weeks. We recommend Direct Deposit and Direct Refund. We need your Bank Information.
Bank Name (Void Check): _____
Routing Number: _____
Account Number: _____
Preparer Input: _____
Ask Questions to the Preparer

MUST HAVE FORMS FOR 2025 IF ISSUED:

1.IRS CP01A – Identity Protection Personal
           Identification _____

2. Did you make any 2025 ES Pymts? – Federal_____   State_____   Including the 1-15-26

YOU MUST ANSWER THESE QUESTIONS:

1. Any major life changing events: Married, New Child, New Home, or Divorce?

   Yes_____ No_____   If answered Yes, circle event above

2. Did you have Health Insurance in 2025?   Bring Forms
   Yes _____ No_____   Form 1095-A _____   Form 1095-B _____   Form 1095-C _____

3. Did you have a Foreign Bank Account with a balance over $10,000?

   Yes_____ No_____   If yes, bring Bank, Stock Account info

4. Did you purchase anything over the Internet that you did not pay Sales Tax for?

   Yes_____ No_____

5. Have you received, sold, sent, exchanged, or acquired internet in Virtual Currency?
   Yes_____ No_____   IRS Form 1099-DA _____

HOW WOULD YOU LIKE YOUR COPY OF 2025 TAX RETURN?

1. Paper Copy _____
   a. Pick Up Tax Return _____
   b. Mail Tax Return _____
2. PDF Email Copy _____   Smart Vault _____
3. DocuSign - for signing E-file forms _____

SPECIAL INSTRUCTION (STAFF USE ONLY):
_____
_____
_____
_____

 Note: We mail tax returns by USPS Priority Mail and the charge will be $25 for Postage and Handling.

FOR STAFF USE ONLY:

   1. DocuSign _____   Date _____   2. EMAIL PDF to Client _____
                                                     3. Uploaded to Smart Vault _____