

2025 Tax Preparation Coversheet

Complete and include with your tax papers

Who will be on the return: Your legal name, plus legal name of anyone else on the tax return. If you are unsure if a dependent will qualify, list them with a "?"

Contact Information: List the best email and phone numbers for questions and planning.

What's changed since last year: i.e., marital status, changed jobs, child graduated, etc...

IRS and State Required Questions:

Did you buy, sell or receive any digital assets?	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Unsure
Do you have any foreign bank accounts?	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Unsure
Do you have health insurance through the ACA marketplace?	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Unsure
Did you buy any items online or out of state and owe sales tax? If you purchased a sales-taxable item and were not charged sales tax, you may owe additional tax.	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> Unsure
Did you pay rent for your main residence anytime this past year?	<input type="checkbox"/> Y <input type="checkbox"/> N
If you paid rent – total amount paid for year?	\$ _____
WI filers, was heat included with your base rent?	<input type="checkbox"/> Y <input type="checkbox"/> N
MN filers , do you want to contribute to the Nongame Wildlife Fund	<input type="checkbox"/> Y <input type="checkbox"/> N
Have you (or spouse) renewed or changed your driver's license in the past 12 months? If so, include a copy of your new license with your tax papers.	<input type="checkbox"/> Y <input type="checkbox"/> N
Do we need to update or verify bank information? NOTE The IRS will no longer issue refunds or accept tax payments by paper check.	<input type="checkbox"/> Y <input type="checkbox"/> N

Questions Related to New Tax Law:

What is your primary occupation?	_____
What is your spouse's primary occupation?	_____
Did anyone receive tip income for a job or self-employment?	__ Y __ N
Did anyone receive overtime pay?	__ Y __ N
Did you purchase any energy efficient improvements to your home?	__ Y __ N
Did you borrow money to purchase a new vehicle this year (new not used)?	__ Y __ N
Did you gift any individual more than \$19,000 worth of cash or assets in 2025?	__ Y __ N

Other Helpful Information or Planning:

Have you filed an identity theft report in the past year?	__ Y __ N
Will you receive an ID theft PIN from either the IRS or state?	__ Y __ N __ Unsure
Do you want information about contributing to any of the following before we file?	
Traditional or ROTH IRA	__ Y __ N
SEP or SIMPLE IRA	__ Y __ N
Health Savings Account (HSA)	__ Y __ N
Education Savings Account (529 or QTP)	__ Y __ N

Notes to discuss

Anything else we should know, questions for this return, or planning for next year.