

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? | \$ <input type="text"/> |
| 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? | | |
| <input type="checkbox"/> | Traditional or ROTH IRA | __ Y __ N |
| <input type="checkbox"/> | SEP or SIMPLE IRA | __ Y __ N |
| <input type="checkbox"/> | Health Savings Account (HSA) | __ Y __ N |
| <input type="checkbox"/> | 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.

[illegible]