

Today's Date \_\_\_\_\_

Tax Year \_\_\_\_\_

**TAXPAYER NAME:** \_\_\_\_\_

**SPOUSE NAME:** \_\_\_\_\_

**BEST PHONE:** \_\_\_\_\_

**E MAIL:** \_\_\_\_\_

**CELL PHONE:** \_\_\_\_\_

**SPOUSE CELL PHONE:** \_\_\_\_\_

Preferred Form of Contact  Phone  Text  Email

Please Check One

YES      NO

Has anything in your family status changed since your last filing of a tax return? **Briefly describe change.**  
(Marital status, children, dependents)

---

Have you had a change in residence since your last filing of a tax return? **Provide new address.**  
(Moved, purchased or sold a home)

---

Has there been any significant changes in your income since your last filing of a tax return?  
(New employer, retired, investments, jury duty, **unemployment**, etc.)

Were you paid overtime during 2025? **If yes, please provide your last paystub for 2025**

Was Overtime Paid on over 40 hours in a week? **(If no, please explain)** |

---

Was Overtime Paid at 1.5 your normal pay rate? **(If no, please explain)**

---

Did you have any significant changes in expenses since your last filing of a tax return? **Please describe.**  
(Medical, home mortgage, contributions, second residence, double property tax payment, etc.)

---

Did you pay Auto Loan interest on a new vehicle with final assembly in the US?  
**Please provide the amount of interest paid. (2026 Form 1098-VLI)** |

---

Did you start or acquire a business or rental since your last filing of a tax return? |

Have you made any qualified energy efficient improvements to your primary residence?  
Such as windows, exterior doors, furnace, air conditioning, water heater, insulation  
**Please provide a receipt for any improvements and Qualified Manufacturer Identification Number** |

**\*\*\*ATTENTION\*\*\***

Confidentiality laws limits us to delivering a return to the taxpayer or authorized agent. If someone else is picking up the return we **MUST** have verbal or written authorization.

**TAXPAYER NAME:**

**SPOUSE NAME:**

YES      NO

Did you or any of your dependents pay any tuition or student loan payments during the last tax year?  
(Education Cr., Interest Exp.) **Please provide Form 1098-T or E**

Any private tuition paid to a WI K-12 school? How much per child? Grade of Child? Federal ID# of School:

Was your health insurance purchased through the Marketplace? **If, Yes Please provide Form 1095-A**

Did you sell any crypto currency in 2025? **If yes, please provide purchase date and price, sale date and proceeds.(Form 1099-B)**

Did you paid rent during the year?

How much did you pay each month?

Was heat included in the amount you paid for Rent?

Have you included the property tax bill you paid in 2025?

If you believe you qualify for Wisconsin Homestead Credit did you **provide your 2025 property tax bill or a completed RENT CERTIFICATE signed by your landlord?**

(Income MUST be BELOW \$24,680, includes Child Support and Social Security Benefits)

If you have previously provided Direct Deposit Banking information is that information still correct?

**IRS will no longer issue paper checks for refunds.** Please provide banking information.

Bank Name: \_\_\_\_\_ Routing Number: \_\_\_\_\_

Account Number: \_\_\_\_\_ Account Type: Checking \_\_\_\_\_ Savings \_\_\_\_\_

Did you make any IRA contributions, outside of your jobs, for this last tax year?

How much was contributed?

Please check type of IRA contributed to      Traditional \_\_\_\_\_      Roth \_\_\_\_\_

Do you have a Health Savings Account (HSA)?

Did you pay for anything with money from your HSA? **If yes, please provide Form 1099-SA**

Any other comments or changes your preparer should be made aware of:

**\*\*\*ATTENTION\*\*\***

Confidentiality laws limits us to delivering a return to the taxpayer or authorized agent. If someone else is picking up the return we MUST have verbal or written authorization.