

**For security purposes, please verify your information.**

**Legal Name:** \_\_\_\_\_ **Spouse Name:** \_\_\_\_\_

**Date of Birth:** \_\_\_\_\_ **Spouse Date of Birth:** \_\_\_\_\_

**PLEASE CHOOSE DELIVERY METHOD OF TAX RETURN (SELECT ONE)**

- SECURE CLIENT PORTAL e-Delivery
- PAPER COPY MAILED TO YOU
- PICK UP PAPER COPY FROM MACOMB OFFICE
- PICK UP PAPER COPY FROM NOVI OFFICE

**Married filers:** Please provide both emails for e-Signing of Form 8879 e-file Authorization.  Preferred Contact Method

Taxpayer Email:

Spouse Email:

Primary Phone:

*If you choose to upload your tax documents to our secure client portal, please scan your documents as one file. It is not necessary to scan each document separately. Upload to us when you are reasonably certain that all documents have been received.*

**NEW THIS YEAR, IRS IS NOT ISSUING PAPER CHECK REFUNDS.  
PROVIDE BANK INFORMATION FOR DIRECT DEPOSIT REFUNDS.**

If your banking info is unchanged from prior year, check here

**Checking or Savings?**

**Bank Name:** \_\_\_\_\_

**Routing #:** \_\_\_\_\_

**Account #:** \_\_\_\_\_

Please refrain from emailing us your bank information!  
Upload to our secure client portal.

Secure Client Portal: [www.cpanerds.com](http://www.cpanerds.com)



## Tax Year 2025 Form 1040 Checklist - Let the fun begin!

### **PLEASE PROVIDE THE FOLLOWING INFORMATION (if applicable to you!):**



Copy of your 2024 tax return. (For 1st year clients only.)  
Form W-2 - Wages earned as an employee  
Form 1099-INT - Interest earned. (Banks send if interest earned is more than \$10)  
Form 1099-OID - Original issue discount  
Form 1099-DIV - Dividends earned  
Form 1099-R - IRA, pension, or annuity distributions  
Form SSA-1099 - Social security benefits received  
Form 1099-CONS - Brokerage statement showing transactions for stocks, bonds, crypto transactions etc.  
Form 1099-DA - For sales of digital assets  
Form 1099-NEC - Nonemployee compensation (Contractor, Entrepreneurs, Self Employed)  
Form 1099-MISC - Miscellaneous income (Rent, Royalties, Other)  
Form 1099-K - Third party payments (Venmo, PayPal, or similar)

If you received the 1099-K in error (for personal transactions), please check here

Form 1099-C - Cancellation of debt  
Schedule K-1 - Share of income or loss from partnerships, S corporations, estates or trusts.  
Form 1099-G - Unemployment income or other state related payments (State refunds)  
Form W-2G - Gambling winnings (casino, lottery, raffle, etc.)  
Form 1099-Q - Distributions from qualified education programs (529 plans)  
Form 1099-QA - Distributions from ABLE account (Achieving a Better Life)  
Form 1099-SA - Distributions from a HSA plan for medical. (Health Savings Account)  
Form 5498-QA - Contributions to an ABLE account. (Achieving a Better Life)  
Form 5498-SA - Contributions to a HSA plan for medical. (Health Savings Account)  
Form 1098 - Home mortgage interest paid (and points)  
Form 1098-VLI - Auto loan interest paid  
Form 1098-T - Education expenses (tuition) paid to a college/university  
Form 1098-E - Student loan interest paid  
Form 1095-A - Health insurance through marketplace  
Form 1099-H - Health coverage tax credit advance payments  
Any tax notices sent to you by IRS or other taxing authority  
Tax Notice "CP01A" from IRS assigning you a six-digit identity protection PIN  
Copies of closing statements regarding the sale/purchase of real estate (property)

### **FOR THOSE WHO PAID ESTIMATED TAXES FOR 2025 TAX YEAR**

Please provide date(s) and amount(s) paid below.

<b>Federal</b>		<b>State</b>	
	Date Paid		Date Paid
Q1			
Q2			
Q3			
Q4			

## LET'S GET PERSONAL

1. Please provide your current address that should appear on your 2025 Tax Return

Address \_\_\_\_\_  
City \_\_\_\_\_  
State \_\_\_\_\_  
Zip Code \_\_\_\_\_

YES      NO

2. Will any of your college aged dependents file their own tax return?

If so, did they file independently?

3. Did your marital status change during 2025?

Spouse Name \_\_\_\_\_  
Spouse Date of Birth \_\_\_\_\_  
Spouse SSN \_\_\_\_\_

4. Were there any changes in dependents from the prior year?

If yes, provide name, relationship, date of birth, and social security number.

Dependent name: \_\_\_\_\_  
Date of birth: \_\_\_\_\_

Relationship: \_\_\_\_\_  
SSN: \_\_\_\_\_

5. Did you pay (or receive) alimony during the tax year?

Paid To/Received From: \_\_\_\_\_ SSN: \_\_\_\_\_  
Amount: \_\_\_\_\_ Divorce Date: \_\_\_\_\_

6. Was a prior divorce agreement modified after 2018?

If so, please provide details if there was a change to the reporting of alimony

7. If you are separated or divorced with children, do you have a separation

agreement or divorce decree that establishes custodial responsibilities?

*If yes, please provide a brief description of the agreement or decree (relative to which parent claims each child):*

\_\_\_\_\_

*Fun Fact: Filing an extension gives you more time to file - not more time to pay.*

## **LOOKING TO POTENTIALLY ITEMIZE DEDUCTIONS**

Please provide the amount for the following (we do not need receipts, but you should keep them though!):



### **Amounts Paid in 2025**

Real estate taxes \_\_\_\_\_

License plate tab registration fee \_\_\_\_\_

Medical out-of-pocket expenses (co-pays, Rx) \_\_\_\_\_

Health insurance premiums \_\_\_\_\_

Miles driven for medical care \_\_\_\_\_

Cash charity contributions \_\_\_\_\_

Non-cash charity contributions \_\_\_\_\_

Description of property \_\_\_\_\_

Place of donation \_\_\_\_\_

Miles driven for charitable reasons \_\_\_\_\_

Gambling losses \_\_\_\_\_

### **OTHER CREDITS/DEDUCTIONS**

**YES      NO**

8. Amount of long-term care premiums paid for yourself or family

Premiums paid: \_\_\_\_\_

9. ENERGY CREDITS: Did you purchase a qualified plug-in electric

fuel cell vehicle, energy efficient home improvements before

October 2025? If yes, please provide details.

10. Did you pay expenses related to the adoption of a child during the year?

Date adoption finalized: \_\_\_\_\_

Amount paid: \_\_\_\_\_

11. Did you make any contributions in 2025 to a MESP or MET? (529 Plan)

Amount paid: \_\_\_\_\_

## OTHER CREDITS/DEDUCTIONS (CONTINUED)

YES      NO

12. Any childcare payments to a person or organization

Amount paid in 2025? \_\_\_\_\_

Number of children? \_\_\_\_\_

Provider name \_\_\_\_\_

Address \_\_\_\_\_

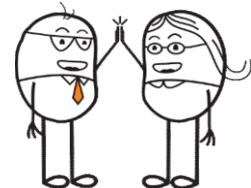
Child care provider SSN or EIN \_\_\_\_\_

13. Have you contributed, or do you plan on contributing to a retirement account not included on your W-2?

	Amount	Indicate Type:		
Taxpayer	_____	Traditional IRA	Keogh	
Spouse	_____	Roth IRA	Simple	
Date of contribution	_____	SEP IRA		

14. If yes, are you planning to make any nondeductible IRA contributions?

Amount of contributions: \_\_\_\_\_



15. Did you make any qualified charitable distributions (QCD) from your IRA this year?

16. Did you purchase a new U.S. assembled vehicle in 2025 for personal use and financed with an auto loan?

If yes, attach Form 1098-VLI from loan provider.

17. Do you have an eligible child under age 18 and want to open a new tax-deferred investment account called a "Trump Account" that will be available in July 2026?

18. If you initiate a Trump Account for an eligible child born in 2025, a contribution pilot program provides \$1,000 contribution.

Do you wish to receive the contribution?

19. Did you receive tips in 2025 in a job where tips are customary?

For example, food service, hospitality, salons, or transportation.

20. Did you receive overtime pay required under federal overtime rules for working more than 40 hours in a work week? If yes, please provide detail.

*Fun Fact: The IRS processed more than 266 million tax returns and other forms during fiscal year 2024.*

## CALLING ALL ENTREPRENEURS - Schedule C Items

21. Provide a summary of revenue and expenses. (QuickBooks profit & loss or similar financial summary)

22. Business travel (self-employed individuals only)

Business miles driven in 2025: \_\_\_\_\_

Total miles driven in 2025: \_\_\_\_\_

**YES**      **NO**

23. Self-employed health insurance premiums paid in 2025



### Amount Paid

For your employees: \_\_\_\_\_

For yourself and family: \_\_\_\_\_

24. Did you use an area of your home exclusively for business purposes?

Square footage of the space used: \_\_\_\_\_

Total square footage of home: \_\_\_\_\_

## CALLING ALL LANDLORDS - Schedule E Items

**YES**      **NO**

25. Do you have a rental property?

*Provide a summary of rental income and expenses (by property)*

26. Did you buy or sell a rental property this year?

*If yes, please provide a copy of the closing statement.*



## GENERAL QUESTIONS

**YES**      **NO**

27. Did you reside in or operate a business in a federally declared disaster area?

The federally declared disaster areas include flooding, hurricane/tropical wind storms, and wildfires in many states.

28. At any time during 2025, did you receive, sell, exchange or otherwise acquire any financial interest in any virtual currency?

29. Do you have a financial interest in or signature authority over a financial account, such as a bank account, securities account, or brokerage account, located in a foreign country?

30. Did you make gifts over \$19,000 to an individual or trust or contribute to a prepaid tuition plan? If yes, please provide details.

31. Would you like to designate \$3 to the presidential election campaign fund?  
*Checking "yes" will not change your tax or reduce your refund.*

## **GENERAL QUESTIONS (CONTINUED)**

32. Did you make any out-of-state purchases (by telephone, internet, mail, or in person) on which the seller did not collect sales or use tax?

What was the total amount of the purchases? \_\_\_\_\_

33. For those with wages earned in a city that has an income tax, were all of your wages worked within the city?

*If all of your wages were not worked within the city, please provide a work log of your hours or days worked in the city and a letter from your employer that states all of your work is not performed within the city.*

34. Did you receive any income not included in the checklist?

### **HAVE SOMETHING YOU'D LIKE TO SHARE FOR 2025?**

### **ANY CHANGES FOR 2026 WE SHOULD KNOW ABOUT?**

