

2025 Income Tax Return

1. Family's Personal Information

| Relationship | Legal Name | | Date of Birth (MM/DD/YYYY) | Tax ID Number (SSN or ITIN) | Occupation | Remarks |
|--------------|------------|-------|-------------------------------|--------------------------------|------------|---------|
| | Last | First | | | | |
| self | | | | | | |
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2. Address and Contact Information - **Address Changed?** :

Yes No

| | |
|-----------|--------------------|
| Address | City / State / ZIP |
| Telephone | E.mail |

3. Check List

* Last Year's Tax Return - Hard Copy or PDF File

* Did you pay estimated tax to Federal or State during 2025? If any, scribe paid amount and date

=>

* Did you have any health insurance coverage during 2025? if yes, scribe the period

=> Not Covered? OR Full year Covered? OR Covered Months? From(month) thru(month)

* Did you have insurance from Covered California(Obama care) at any time in 2025? Yes No

=> if yes, bring or attach *Form 1095-A(Federal) & Form FTB 3895(California)*, Health Insurance Marketplace Statement

* Bank Information(Routing No & Account No or Void Check) for Direct Deposit or Debit (Tax refund or Owed)

=> Bank Name/ Routing No + Account No :

4. Attachments - Copy or Scanned Documents)

* W2's from each employer you worked for

* All 1099's received

- 1099-INT for Interest Received
- 1099-DIV for Dividends received
- 1099-S for the sale of Real Estate
- 1099-SSA for Social Security Benefits
- 1099-R for distributions from pensions, annuities & IRA's
- 1099-G For Unemployment or Prior Year State Tax Refund
- 1099-NEC/MISC for Independent Contractor fees

** Loan Interest Paid for New Vehicle Purchased in 2025(Assembled in the U.S. Only)

* 1098 - Mortgage & Home Equity Loan Interest paid - Do not need for Standard Deduction

* Total of all medical and dental expenses - Do not need for Standard Deduction

* Total of child or dependent care expenses

* The amount of property tax you paid during the year - Do not need for Standard Deduction

* List of charitable contributions made during the year - Do not need for Standard Deduction

* List of educational and job-related expenses for the year - Do not need for Standard Deduction

* 1098-T (College Tuition), 1098-E(Student Loan Interest)

* A copy of your last car registration notice - Do not need for Standard Deduction

* 1099-B, Purchase and Sale information for Stock or Cryptocurrencies

* etc. : sch K-1 / 1099-K / W-2G (Gambling WIn) / Foreign Income & Foreign Tax Paid

** This is a inclusive list and not everything will apply to you. Feel free to call us to find out what you will need to bring.