

INDIVIDUAL TAX RETURN WORKSHEET

Please call our office if you would like to receive organizer worksheets with your specific information
or worksheets for rental, farm or business tax matters

Taxpayer (T)	Spouse (S)
SSN (if new client)	SSN (if new client)
DOB (if new client)	DOB (if new client)
Cell ph #	Cell ph #
Email address:	Email address:
Address (if new)	
County:	School District:

FOR DIRECT DEPOSIT OF REFUNDS (a copy of a voided check or bank card is preferred)

Bank name	
Routing Number	
Account Number	
Checking or savings	

PLEASE BRING IN THE FOLLOWING:

- * ALL W2s, 1099 / 1098 (interest, dividend, Patr. Dividend Etc.)
- * ALL tax forms / Correspondence received from the government
- * Documents concerning retirement plan contributions / withdrawals
- * Year-end Social Security benefit statements
- * College tuition expense documentation
- * Any health insurance coverage statements (1095-A, 1095-B, or 1095-C)

Any new dependents this tax year ? (circle one)	YES	NO
if yes:	Name: _____	DOB _____
	Name: _____	DOB _____
*if child born in 2025 would you like to open a Trump account? (value \$1000)		SSN _____
		SSN _____
		Y/N _____

ITEMIZED DEDUCTIONS WORKSHEET

MEDICAL OUT-OF-POCKET EXPENSES:	\$ _____	TAXES PAID:	
_____	\$ _____	Real Estate	\$ _____
	\$ _____	Auto license	\$ _____
Charitable Contributions:		Other taxes	\$ _____
Total amount donated:	\$ _____		
Other than cash contributions (date/charity)	\$ _____		

INTEREST PAID:		CHILDCARE EXPENSE:	
Name / address of mortgage holder: _____		Number of qualifying children this year: _____	
		Daycare provider name: _____	
Mortgage interest	\$ _____	Daycare provider address: _____	
Points paid	\$ _____		
Student loan interest	\$ _____	Daycare provider SS #: _____	
		Amt \$ paid each child: _____	

OTHER:			
Tax preparation	\$ _____	Did you pay tuition or related expenses to a college or trade school this year? (for yourself or dependents)	
Volunteer Firefighters EMS credit?	\$ _____	YES / NO Amount paid \$ _____	
Private school tuition & textbooks K-12	\$ _____	(please bring 1099T receipt)	
Extra-curricular activities expenses K-12	\$ _____	Name of school: _____	
Iowa college savings plan	\$ _____		
Educator expenses	\$ _____		

GENERAL QUESTIONS:

YES / NO Did your marital status change during this year? if yes, explain: _____

YES / NO Can you or your spouse be claimed as a dependent by someone else? _____

YES / NO Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)
if yes, explain: _____

YES / NO Did you have any changes in dependents during this year?
if yes, explain: _____

YES / NO Did any member of your household have healthcare coverage through the Marketplace (Obamacare)?
if YES, Provide copies of Form 1095-A

YES / NO Did you buy or sell any stock, bonds, or other investments during the year?

YES / NO Did you rent out your home or use it for business? _____

YES / NO Did you have any debts cancelled or forgiven this year? _____

YES / NO Did you receive income or incur expenses as an independent contractor (e.g., Uber, Instacart, DoorDash)?
if YES, Provide documentation

YES / NO Did you make any contributions to IRA, Roth, Keogh, SIMPLE, SEP, 401(k), other qualified retirement plan this year?

YES / NO Did you execute any rollover from an IRA, Roth, Keogh, SIMPLE, 401K or other retirement plans during the year?

YES / NO Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or your dependents during the year? (even if classes were attended in another year)

YES / NO Did you pay student loan interest for yourself, your spouse, or your dependents during the year?
if YES, amount of interest that was paid \$ _____

YES / NO Did you make any energy-efficient improvements to your main home during the year? (windows, insulation etc.) _____

YES / NO Did you receive any notices from the IRS or state taxing authority? if YES, please attach a copy of the notice

YES / NO Did you receive pay for overtime worked this tax year? amount \$ _____

YES / NO Did you receive any tips this tax year? amount \$ _____

Tax estimates paid per Qtr:	State	1	2	3	1	total:
	Federal	1	2	3	4	total: