

## 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: \_\_\_\_\_ SSN: \_\_\_\_\_  
Name: \_\_\_\_\_ DOB: \_\_\_\_\_ SSN: \_\_\_\_\_  
Y/N: \_\_\_\_\_

\*if child born in 2025 would you like to open a Trump account? (value \$1000)

### 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)	\$		

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

<b>OTHER:</b>			
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 \$ _____ (please bring 1099T receipt)	
Private school tuition & textbooks K-12	\$ _____	Name of school: _____	
Extra-curricular activities expenses K-12	\$ _____		
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: