

Taxpayer Name

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Did you receive TIPS or OVERTIME during 2025? If this information is not separately stated on your W-2, a copy of your last pay stub of the year will be needed.

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Did you purchase a qualified plug-in electric vehicle, or a clean energy vehicle? A clean vehicle statement should have been provided by the dealer.

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Did you purchase a NEW vehicle in 2025, assembled in the USA, and took out a car loan? If yes, provide the interest paid in 2025, the VIN of the vehicle, and the sale document from the dealership.

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Are you a teacher/educator? For 2026 forward you will be allowed a larger deduction potentially, please keep receipts and accurate records of what you spend in the coming years.

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Did you have any transactions involving virtual currency?

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Did you change bank accounts in the last year? If so please provide new bank info

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Have you been a victim of identity theft?

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Were there any changes to dependents from the prior year? If yes, please provide full name, date of birth and social security number

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Did you pay for child care during the year? If you are divorced or separated with a child, do you have a divorce decree or separation agreement which establishes custodial responsibilities?

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Did you buy or sell any real estate this year?

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Did you buy or sell any stock this year?

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Did you take out a home equity loan? If so what was it for?

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Do you have any foreign bank accounts or foreign investments?

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Did you have unemployment, gambling or lottery winnings this year?

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Did you start collecting on retirement, pension or social security this year?

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Did you have any post-secondary education expenses?

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Did you contribute or withdraw funds from a 529 plan?

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Did you pay any student loan interest this year?

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Are you an active firefighter? What District?

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Did you or your spouse get a new drivers license this past year? If so please provide the issue date, expiration date, and Doc#/IDUSA # on the back of the license.

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