

# Client Data Sheet

This form is to assist you in gathering your \_\_\_\_\_ income tax information.

TAXPAYER FIRST NAME	_____	SPOUSE FIRST NAME	_____
TAXPAYER LAST NAME	_____	SPOUSE LAST NAME	_____
OCCUPATION	_____	OCCUPATION	_____
SSN/ITIN	_____	SSN/ITIN	_____
EMAIL	_____	EMAIL	_____
MAIN PHONE	_____	MAIN PHONE	_____

What is your immigration status?

What is your immigration status?

<input type="checkbox"/>	US Citizen, or Permanent Resident, or US National	<input type="checkbox"/>	US Citizen, or Permanent Resident, or US National
<input type="checkbox"/>	Other	<input type="checkbox"/>	Other
ADDRESS	APT#		
CITY	STATE	ZIP	

MARITAL STATUS	SINGLE	MARRIED FILING		QUALIFYING SURVIVING SPOUSE		If Married, did you and spouse live together at any time after <u>06/30/2025</u> ?		Yes	No
		Jointly	Separately	Year spouse died in					
				2023	2024	You (or your spouse if MFJ) lived in the USA for more than half of 2025?		Yes	No
Dependents: (List the youngest first)			MM/DD/YY	Dependent's SSN	Relationship to you	# of Months lived in your home this tax year	I pay more than ½ the cost of keeping up a home		
First name	Last name								

Yes	No	CHECK ALL THAT APPLY					
<input type="checkbox"/>	<input type="checkbox"/>	You, your spouse and/or any your qualifying dependents in 2025 received Medical insurance through the Marketplace.		If yes, please provide your form 1095-A.			
<input type="checkbox"/>	<input type="checkbox"/>	You and/or your spouse received, sold, sent, exchanged, or otherwise acquired any financial interest in any digital assets.		If yes, please provide forms 1099-K, 1099-DA from your crypto/brokerage accounts (or your crypto gains/losses calculation for the tax year).			
<input type="checkbox"/>	<input type="checkbox"/>	Are you/your spouse self-employed?		If yes, please fill out the Net Profit from Business Worksheet.			
<input type="checkbox"/>	<input type="checkbox"/>	Are you/your spouse Owner of the Company?		If yes, please fill out and provide your corporate's Finance Statement/ P&L and Balance Sheet.			
<input type="checkbox"/>	<input type="checkbox"/>	Someone else can claim you and/or your spouse as a dependent.		Yes	No	Your child did not live with you, but is claimed as your dependent	
<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>	Would you like your refund deposited into /tax due paid from your bank account?		If yes, please provide your bank account information.			
	Checking acc		Saving acc	Routing Number	Account Number		

CHILD CARE INFORMATION (Day-Care, After-School-Care, Nannies, etc.)			
(Note: This information is required for each provider. Use an additional sheet if more space is needed)			
Provider's Name			Provider's SSN/EIN
Provider's Address			Amount Paid to Provider \$
I hereby acknowledge that Sorsher and Associates will prepare my income tax return solely based on the information I provide, in accordance with the Tax Reform Act of 2025. Under the Safeguarding American Citizenship Act of 2024, fraudulent filings may result in civil, criminal, and immigration penalties, including loss of U.S. citizenship. I accept full responsibility for the accuracy and completeness of such information and release Sorsher and Associates from any liability arising from errors and omissions from incomplete or false data, or future changes in law.			
Taxpayer's Signature		Date	
Spouse's Signature		Date	

Please go to the 2<sup>nd</sup> page!

# Tax Preparation Checklist \_\_\_\_\_

## Information about your income:

W-2 forms for wages  
W-2G (lottery or gambling winnings/losses)  
1099-C forms for cancellation of debt  
1099-G forms for unemployment compensation, or state or local tax refunds  
1099-NEC, 1099-K forms (for any independent contractor work)  
K-1 (income from companies)  
1099-MISC (Rents, Royalties, Prizes and awards)  
1099-R for payments/distributions from IRAs or retirement plans  
1099-S forms for income from sale of a property  
1099-INT, 1099-DIV, 1099-B, 1099-DA, K-1 forms for investments/interest income/crypto sales  
SSA-1099 for Social Security benefits received  
Alimony received  
Business or farming income - profit/loss statement, capital equipment information  
Rental property income and expenses: profit/loss statement, suspended loss information  
Miscellaneous income: jury duty, gambling winnings, Medical Savings Account, scholarships, etc.  
Foreign income, foreign bank accounts, financial interest in or signature or other authority over foreign financial accounts (location, name of bank, account number, peak value of account during the year, the aggregate value of the financial account)

## Adjustments to your income and itemized deductions / deductible expenses:

Form 1098-E for student loan interest paid (or loan statements for student loans)  
Form 1098-T for tuition paid (or receipts/canceled checks for tuition paid for post-high school) Records of IRA contributions made during the year  
Receipts for any qualifying energy-efficient home improvements (air conditioners, exterior doors, windows, etc.).  
Records of Medical Savings Account (MSA), HAS (Health Saving Account) contributions  
Self-employed health insurance payments records  
Alimony paid (for divorces finalized before 2019)  
SEP, SIMPLE, and other self-employed pension plans  
Forms 1098 (Mortgage Interest Statement) and 1098-VLI (Vehicle Loan Interest Statement)  
Charitable donations (cash amounts, official charity receipts; value of donated property; miles driven and out-of-pocket expenses);  
qualified one-time charitable distribution from individual retirement account  
Medical and dental expense records  
Receipts for new qualified plug-in electric drive motor vehicle or previously owned clean vehicle  
State and local income taxes paid  
Real estate (property) taxes paid

<i>I hereby acknowledge that Sorsher and Associates will prepare my income tax return solely based on the information I provide, in accordance with the Tax Reform Act of 2025. Under the Safeguarding American Citizenship Act of 2024, fraudulent filings may result in civil, criminal, and immigration penalties, including loss of U.S. citizenship. I accept full responsibility for the accuracy and completeness of such information and release Sorsher and Associates from any liability arising from errors and omissions from incomplete or false data, or future changes in law.</i>			
<b>Taxpayer's Signature</b>		<b>Date</b>	
<b>Spouse's Signature</b>		<b>Date</b>	