

# ELLIOTT AND ELLIOTT ACCOUNTANTS, LLC

## 2025 Intake Tax Return Questions:

Name (TP): \_\_\_\_\_ Birthdate: \_\_\_\_\_ SSN: \_\_\_\_\_

Spouse (SP): \_\_\_\_\_ Birthdate: \_\_\_\_\_ SSN: \_\_\_\_\_

Address: \_\_\_\_\_

What county do you live in: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

At any time in 2025 did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?  yes or  no (Ex: Virtual Currency, Virtual assets, Cryptocoin, Bitcoin, NFT's, etc.)

Did you or your spouse update or renew your driver license in 2025 or 2026 or are you a new client? If so, we will need a copy of it.  yes or  no

Driver License:

TP State:  Number: \_\_\_\_\_ Date Issued: \_\_\_\_\_ Date Expired: \_\_\_\_\_

SP State:  Number: \_\_\_\_\_ Date Issued: \_\_\_\_\_ Date Expired: \_\_\_\_\_

Do you wish to have direct deposit?  yes or  no Is your banking information the same as last year for direct deposit?  yes or  no If it has changed, you are a new client, or you are adding direct deposit this year, we will need to have your name of bank, routing number, and account number. We will take a copy of a check or a voided check for this information.

Were you ever denied the Earned Income Credit, Child Tax Credit, American Opportunity Tax Credit, Head of House, or Other Dependent Credit?  yes or  no

Dependents Information:

Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_ SSN: \_\_\_\_\_

Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_ SSN: \_\_\_\_\_

Name: \_\_\_\_\_ Birthdate: \_\_\_\_\_ SSN: \_\_\_\_\_

(Add more below if needed)

**2025 Intake Tax Return Questions page 2:**

**Social Security – Senior Deduction:**

Did you or your spouse collect social security in 2025? \_\_\_\_\_ Yes or \_\_\_\_\_ No

If yes, we need a copy of your SSA-1099 form.

(Please note if you meet income eligibility and are married you must file MFJ to qualify for the Senior Deduction. MFS does not qualify.)

**Qualified Tip Deduction:**

Did you receive tips in 2025? \_\_\_\_\_ Yes or \_\_\_\_\_ No

What is your occupation? (To qualify, your occupation must be an IRS approved tip occupation.)

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Do your tips show on your W-2 in Box 7? \_\_\_\_\_ Yes or \_\_\_\_\_ No

If not we will need the total tips you received that are not reported on your W-2 : \$ \_\_\_\_\_

**Overtime:**

Did you receive Overtime in 2025? \_\_\_\_\_ Yes or \_\_\_\_\_ No

Does your Overtime show on your W-2 as Overtime, separate from your regular pay? \_\_\_\_\_ yes or \_\_\_\_\_ No

If not we will need to know how much overtime you received: \$ \_\_\_\_\_

(Please note if you received 1 ½ hour of overtime, what is reported it's the ½ hour that is not your regular base hourly rate OR if you received double overtime, 2hrs of overtime, what is reported is 1 hour that is not your regular base hourly rate.)

**New Automobile Interest Deduction:**

Did you buy a new car in 2025? \_\_\_\_\_ Yes or \_\_\_\_\_ No

- 1). To qualify the vehicle must have been assembled in the United States. We need the sale's paperwork that contains the VIN number
- 2). We will also need your annual interest report showing how much interest you paid in 2025 that was reported to the IRS by your lender. To qualify it must have been reported to IRS.

Signature of Taxpayer: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Spouse: \_\_\_\_\_ Date: \_\_\_\_\_