

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, Cryptocurrency, 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: _____

Direct Deposit is mandatory for refunds. If you had direct deposit last year, is your banking information the same? _____yes or _____no If it has changed, you are a new client, or you are adding direct deposit for the first time, we will need your bank's name, type of account (Checking/Saving), 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)

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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.)

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: \$ _____

How much double overtime did you receive: \$ _____

(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: _____