Drop Off Date:	Cashwell Accounting, Inc- 2025 Tax Return Intake Form	Referred by:

You will need:
- Tax information such as Forms: W2, 1099, 1098, 1095.
- Social Security cards or ITIN letters for all persons on your tax return.
- Picture ID (such as valid driver's license) for your spouse and you.
- Please complete pages 1-3 of this form.
- You are responsible for the information on your return. Please provide complete and accurate information.

At any time during 2025: Did you receive, sell, send, exchange or otherwise acquire any financial interest in any virtual currency? ☐ Yes ☐ No

Part I – Your Personal Information (If you are filing a joint return, enter your names in the same order as last year's return)

1. Your first name	M.I.	Last name	Best contact number	Are you a U.S. citizen? ☐ Yes ☐ No
2. Your spouse's first name	M.I.	Last name	Best contact number	Is your spouse a U.S. citizen? ☐ Yes ☐ No

3. Mailing address	Apt #	City	State	ZIP code

4. Your Date of Birth	5. Your job title	6. Last year, were you:	a. Full-time student ☐ Yes ☐ No
		b. Totally and permanently disabled ☐ Yes ☐ No	c. Legally blind ☐ Yes ☐ No
7. Your spouse's Date of Birth	8. Your spouse's job title	9. Last year, was your spouse:	a. Full-time student ☐ Yes ☐ No
		b. Totally and permanently disabled ☐ Yes ☐ No	c. Legally blind ☐ Yes ☐ No

10. Can anyone claim you or your spouse as a dependent? ☐ Yes ☐ No ☐ Unsure

11. Have you, your spouse, or dependents been a victim of tax related identity theft or been issued an Identity Protection PIN? ☐ Yes ☐ No

12. Provide an email address (optional)- this email address will not be used for contacts from the Internal Revenue Service.

Part II – Martial Status and Household Information

1. As of December 31, 2025, what was your marital status?

☐ Never Married
☐ Married
☐ Divorced
☐ Legally Separated
☐ Widowed

(This includes registered domestic partnerships, civil unions, or other formal relationships under state law)

a. If Yes, Did you get married in 2025? ☐ Yes ☐ No

b. Did you live with your spouse during any part of the last six months of 2025? ☐ Yes ☐ No

Date of final decree _____

Date of separate maintenance decree _____

Year of spouse's death _____

2. List the names below of:
- everyone who lived with you last year (other than your spouse)
- anyone you supported but did not live with you last year

If additional space is needed check here ☐ and list on page 3

Name (first,last) Donot enter your name or spouse's name below (a)	DateofBirth (mm/dd/yy) (b)	Relationship to you (for example: son, daughter, parent, none, etc) (c)	Number of months lived in your home last year (d)	US Citizen (yes/no) (e)	Resident of US, Canada, or Mexico last year (yes/no) (f)	Single or Married as of 12/31/25 (g)	Full-time Student last year (yes/no) (h)	Totally and Permanently Disabled (yes/no) (i)	To be completed by a Certified Preparer: Is this person a qualifying child/relative of any other person? (yes/no)	Did this person provide more than 50% of his/her own support? (yes,no,n/a)	Did this person have less than $5,200 of income? (yes,no,n/a)	Did the taxpayer(s) provide more than 50% of support for this person? (yes,no,n/a)	Did the taxpayer(s) pay more than half the cost of maintaining a home for this person? (yes/no)

Check appropriate box for each question in each section

Yes	No	Unsure	Part III – Income – Last Year, Did You (or Your Spouse) Receive
☐	☐	☐	1. Wages or Salary? (Form W-2) If yes, how many jobs did you have last year? _____ Total Over Time (OT) Pay? _____
☐	☐	☐	2. Tip Income?
☐	☐	☐	3. Scholarships? (Forms W-2, 1098-T)
☐	☐	☐	4. Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)
☐	☐	☐	5. Refund of state/local income taxes? (Form 1099-G)
☐	☐	☐	6. Alimony income or separate maintenance payments?
☐	☐	☐	7. Self-Employment income? (Forms 1099-MISC, 1099-NEC, 1099-K, cash, digital assets, or other property or services)
☐	☐	☐	8. Cash/check/digital assets, or other property or services for any work performed not reported on Forms W-2 or 1099?
☐	☐	☐	9. Income (or loss) from the sale or exchange of stocks, bonds, digital assets or real estate? (including your home) (Forms 91099-S, 1099-B)
☐	☐	☐	10. Disability income? (such as payments from insurance, or workers compensation) (Forms 1099-R, W-2)
☐	☐	☐	11. Retirement income or payments from pensions, annuities, and or IRA? (Form 1099-R)
☐	☐	☐	12. Unemployment Compensation? (Form 1099-G)
☐	☐	☐	13. Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)
☐	☐	☐	14. Income (or loss) from rental property?
☐	☐	☐	15. Other income? (gambling, lottery, prizes, awards, jury duty, digital assets, Sch K-1, royalties, foreign income, etc.)

Yes	No	Unsure	Part IV – Expenses – Last Year, Did You (or Your Spouse) Pay
☐	☐	☐	1. Alimony or separate maintenance payments? If yes, do you have the recipient's SSN? ☐ Yes ☐ No
☐	☐	☐	2. Contributions or repayments to a retirement account? ☐ IRA (A) ☐ Roth IRA (B) ☐ 401K (B) ☐ Other
☐	☐	☐	3. College or post secondary educational expenses for yourself, spouse or dependents? (Form 1098-T)
☐	☐	☐	4. Any of the following? ☐ (A)Medical & Dental (including insurance premiums) ☐ (A)Mortgage Interest (Form 1098) ☐ (A)Taxes (State, Real Estate, Personal Property, Sales) ☐ (B)Charitable Contributions
☐	☐	☐	5. Child or dependent care expenses such as daycare?
☐	☐	☐	6. For supplies used as an eligible educator such as a teacher, teacher's aide, counselor, etc.?
☐	☐	☐	7. Expenses related to self-employment income or any other income you received?
☐	☐	☐	8. Student loan interest? (Form 1098-E)

Yes	No	Unsure	Part V – Life Events – Last Year, Did You (or Your Spouse)
☐	☐	☐	1. Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in box 12)
☐	☐	☐	2. Have credit card, student loan or mortgage debt canceled/forgiven by a lender or have a home foreclosure? (Forms 1099-C, 1099-A)
☐	☐	☐	3. Adopt a child?
☐	☐	☐	4. Have Earned Income Credit, Child Tax Credit or American Opportunity Credit disallowed in a prior year? If yes, for which tax year? _____
☐	☐	☐	5. Purchase and install energy-efficient home items? (such as windows, furnace, insulation, etc.)
☐	☐	☐	6. Receive the First Time Home Buyers Credit in 2008?
☐	☐	☐	7. Make estimated tax payments or apply last year's refund to this year's tax? If so, how much and on what dates were payments made?
☐	☐	☐	8. File a federal return last year containing a "capital loss carryover" on Form 1040 Schedule D?
☐	☐	☐	9. Have health coverage through the Marketplace (Exchange)? [Provide Form 1095-A]
☐	☐	☐	10. Did you purchase a new personal use vehicle assembled in the U.S? If so, please provide loan interest paid on this auto loan.

Additional Information and Questions Related to the Preparation of Your Return

1. Presidential Election Campaign Fund (If you check a box, your tax of refund will not change)
   Check here if you, or your spouse if filing jointly, want $3 to go to this fund ☐ You ☐ Spouse
2. If you are due a refund, would you like: a.Direct deposit ☐ Yes ☐ No b.To purchase U.S. Savings Bonds ☐ Yes ☐ No c.To split your refund between different accounts ☐ Yes ☐ No
3. If you have a balance due, would you like to make a payment directly from your bank account? ☐ Yes ☐ No
4. Did you live in an area that was declared a Federal disaster area? ☐ Yes ☐ No If yes, where? _____
5. Did you, or your spouse if filing jointly, receive a letter from the IRS? ☐ Yes ☐ No
6. Would you like to be provided a PDF copy of your tax return? ☐ Yes ☐ No Email Address _____

Additional Comments:

_____
_____
_____
_____
_____
_____
_____
_____

Please Note: *Per Office Policy, NO Tax return will be filed until*

1. Invoice is paid

2. Engagement letter is signed

3. E-file signature form 8879 is signed

Payment Options:

A 3% credit card fee will be applied to all credit card transactions.

Zelle

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CASHWELL ACCOUNTING, INC.

352-242-1001