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TAX YEAR  
**2025**

**Please submit your tax documents by March 23<sup>rd</sup> to ensure filing on time.**

Taxpayer Name: \_\_\_\_\_ DOB: \_\_\_\_\_ Occupation: \_\_\_\_\_

Spouse Name: \_\_\_\_\_ DOB: \_\_\_\_\_ Occupation: \_\_\_\_\_

PREFERRED: PHONE NUMBER: \_\_\_\_\_ EMAIL: \_\_\_\_\_

Address: If new in 2025 \_\_\_\_\_

**DEPENDENTS: IF NEW OR NOT THE SAME AS LAST YEAR.**

Name, DOB, Relationship, Social Security Number, # of months in your home

**DID YOU GET A NEW DRIVERS LICENSE IN 2025? If so, we'll need the following info from it.**

Taxpayer	Spouse
9 Digit DL #:	9 Digit DL #:
Issue Date:	Issue Date:
Expiration Date:	Expiration Date:
First three characters of Doc ID:	First three characters of the Doc ID:

**\*\*Document ID on back of DL, first three after IDUSA if Enhanced DL\*\***

Year-end information documents such as:

- W-2's for wages
- 1099's for: interest (1099-INT), dividends (1099-DIV), stock sales (1099-B Consolidated Stmt)
- Miscellaneous income earned (1099-MISC)
- Non-Employee Compensation (1099-NEC) **\*\*See other income note below\*\***
- Social Security received (SSA-1099)
- Pension, Annuity, and IRA income received (1099-R)
- W-2G's for Gambling Winnings
- Itemized Deductions:
  - Mortgage interest (Form 1098)
  - Real Estate Taxes Paid: Include STAR Credit Checks rcvd
  - Charitable Donations Itemized (receipted donations only)
  - Medical Expenses Itemized

**\*\*Do you have any other income? Are you an independent contractor or do you have a small business? Do you have a "side gig" ... Uber, Lyft, Doordash, AirBNB, Ebay, Etsy, Amazon**

Request a Schedule C Planner. At a minimum, total all your income including 1099-NEC's and summarize your expenses by category. Include your business banks statements, check register, and credit cards statements if applicable. If equipment or buildings are part of the business, and you're a new client, we need the depreciation history.

**DO YOU HAVE AN IDENTITY PROTECTION PIN issued by the IRS? We will need it to EFILE.**

Do you have any interest in or authority over any foreign bank account or trusts? Y or N

Virtual Currency: Did you receive, sell, exchange, give or dispose of any digital assets? Y or N

**DO YOU HAVE HEALTH INSURANCE THROUGH THE ONLINE MARKETPLACE? If so, we'll need Form 1095-A**

As a NYS resident did you make out of state purchases that would have been subject to sales tax if purchased in NY? Y or N

**ADDITIONAL TAX DOCUMENTS:**

- Did you collect any unemployment?** If so, you must get your 1099-G online.
- Do you have a dependent in college? **Tuition information** for Education Credits: 1098-T and transaction history (Bursar's Report) for calendar year 2025
- Did you pay **Student Loan interest?** Amount
- Did you receive a **1099-C for cancellation of debt: CC, student loan, etc.**
- Did you make any **IRA contribution?** Type: Roth or Traditional and the Amounts
- Did you make any **contributions or take distributions to/from a NYS 529 Plan?** Amounts
- Did you receive a **NYS Inflation Refund check (NEW IN 2025)?** If so, how much was it?
- Did you make any **Estimated Tax payments?** Amounts and payment dates.
- Did you pay for **Childcare?** Provider's name, address and federal ID number. Also, the amount paid to the provider for each dependent.
- Do you have **Long Term Care Insurance?** Amount of premium paid.
- Did you **buy or sell a house?** Bring your closing paperwork including settlement statements.
- Do you **have rental property?** Total your income and summarize your expenses by category (i.e. supplies, repair, advertising, capital improvements, etc.) and bring the depreciation history if this is your first year at H&E
- Did you receive a 1099-K?** What for? Include copy.
- Did you **purchase an electric vehicle prior to September 30, 2025,** that may qualify for tax credits?
- Did you make any **home improvements that may qualify for energy credits?**

**NEW CLIENTS: Please include a copy of your most recent tax return.**

Office Use:

**Last Name:** \_\_\_\_\_

**Drop Off Date:** \_\_\_\_\_