

TAX BREAKS – CLIENT Checklist

Tax Year: ☐ 2024 ☐ 2025 ☐ Other: _____ Appointment Type: ☐ Zoom ☐ In-Person

Legal Name		
Social	Date of Birth:	Identity Pin
Telephone	Email	Job Title
Legal Name		
Social	Date of Birth:	Identity Pin
Telephone	Email	Job Title
Address:		City: State: Zip:
Filing Status : ☐ Single ☐ Head of Household ☐ Married ☐ Married filing Seperate ☐ Widow		
☐ Do you financially take care of a parent? ☐ Do you have a child that you are not claiming on your tax return?		

Name as it appears on the social security card	Social	Date of Birth	Relationship	Months in Home	College Student ?

Banking Information for Direct Deposit: ☐ Savings ☐ Checking
Bank Name: Routing: Account

Fee Authorization & Payment Disclosure

I understand that my tax preparation fees will be deducted directly from my federal refund if I elect the refund deduction option. There is a \$40.00 fee to have the fee deducted from the refund.

I acknowledge that if my refund is reduced, delayed, or intercepted due to federal or state debt, including but not limited to:

- Past-due child support
- Defaulted student loans
- IRS or state tax liabilities
- Other government offsets

TaxBreaks may not receive payment from my refund.

If TaxBreaks does not receive payment within five (5) weeks from the date the return is filed due to refund delay, offset, rejection, or any unforeseen circumstance, I authorize TaxBreaks to collect the agreed preparation fee using the checking account provided for my refund deposit and/or the credit or debit card listed below.

I understand that I remain fully responsible for payment of tax preparation services regardless of refund status.

Credit/Debit Card: Cardholder Name: _____ Card Number: _____

Expiration Date: _____ CVV: _____ Billing Zip Code: _____

☐ I will pay my fees upfront . Credit card payment will include a three Percent fee.

Tax payer Document & Information CertificationI certify that the documents and information I am submitting are complete and accurate to the best of my knowledge. I understand that TaxBreaks relies on the information I provide to prepare my tax return a that I am responsible for reviewing the final return before it is filed.

Signature: _____ Date: _____

Wage & Earned Income ☐ W-2 Wages and taxes withheld from employer. ☐ 1099-NEC Self-employed or contract income. ☐ 1099-MISC Other income (rent, prizes, etc.). ☐ 1099-K Payment app or merchant income. ☐ Cssh App / Thirdparty app pay Payment app or merchant income. Deductions to income: ☐ Over Time ☐ Tips	Business, Rental & Pass-Through Income ☐ Schedule K-1 Income from partnerships or S-corps. ☐ Rental Income Rent received from property. Investment & Interest ☐ 1099-INT Bank or account interest. ☐ 1099-DIV Dividend income.	Retirement & Government Benefits ☐ 1099-R Retirement distributions. ☐ SSA-1099 Social Security benefits. ☐ 1099-G (Unemployment) Unemployment income. Other Taxable Income ☐ Jury Duty Pay Jury service income. ☐ Gambling Winnings Casino or lottery winnings. ☐ Cryptocurrency Activity
MEDICAL & DENTAL EXPENSES ☐ Doctor, dental, specialist visits Amount: \$ _____ ☐ Prescription medications Amount: \$ _____ ☐ Health insurance premiums (if not pre-tax) \$ _____ ☐ Hospital & surgery costs \$ _____ ☐ Mental health treatment \$ _____ ☐ Medical mileage & transportation Amount: \$ _____ ☐ Long-term care premiums Amount: \$ _____ ☐ Medical equipment (glasses, hearing aids, etc.) Amount: \$ _____ GIFTS TO CHARITY ☐ Donations by cash check or credit _____ ☐ Non-cash donations (clothing, furniture, goods) \$ _____ ☐ Mileage for charitable service _____	HOME MORTGAGE INTEREST ☐ Mortgage interest (Form 1098) Amount: \$ _____ ☐ Home equity loan interest (if used to improve home): \$ _____ ☐ Mortgage insurance premiums Amount: \$ _____ ☐ Points paid on mortgage refinance or purchase Amount: \$ _____ ☐ Real estate (property) taxes Amount: \$ _____ ☐ Personal property taxes (vehicle registration based on value) Amount: \$ _____ Children ☐ Childcare expenses, attach provider documentation ☐ Adoption Credit CASUALTY & THEFT LOSSES ☐ Disaster-related property losses Amount: \$ _____	☐ Gambling losses (limited to winnings) Residential Clean Energy Credit (Solar & Major Systems) ☐ Solar panels Paid: \$ _____ ☐ Solar water heater : \$ _____ ☐ Battery storage system: \$ _____ ☐ Central Air Conditioner \$ _____ ☐ Natural Gas, Propane, or Oil Furnace / Boiler \$ _____ ☐ Biomass Stove or Boiler Amount Paid: \$ _____ ☐ Exterior Windows (Energy Star certified) Amount Paid: \$ _____ ☐ Exterior Doors (Energy Star certified) Amount Paid: \$ _____ ☐ Skylights (Energy Star certified) Amount Paid: \$ _____ ☐ Insulation & Air Sealing Materials Amount Paid: \$ _____