

## Happy New Year!

We hope 2025 treated you well! As 2026 tax season approaches, we're here to make filing smooth and stress-free. Visit our website for the latest tax updates, client forms, and checklists.

**Before we prepare your 2025 return, please complete a client information sheet (attached below) for each individual included in the tax preparation.** This ensures we have your current phone numbers, address, driver's license, updated IRS pin if applicable, direct deposit, delivery preferences, and any other updates.

### How to get us your documents:

- **Appointment:** Meet us in person and drop them off.
- **Mail:** Send via your preferred service.
- **Drop-Off:** Deliver during business hours.
- **Client Portal:** Upload securely once all documents are ready. **Please wait to upload until you have all documents ready.**

Check that you have everything—W-2s, 1099s, K-1s, etc.—and a quick look at your check register can help catch any missed items.

**A Quick Note About Uploading Your Tax Documents:** We won't begin working on your tax return until you've selected the "Done Uploading" button in the client portal.

Please only click "Done Uploading" once you've finished uploading **ALL** of your documents. Selecting it after each document may cause delays in getting started on your return.

**To help ensure your return is completed on time for the April 15, 2026 filing deadline, please provide or upload all personal tax documents by April 1, 2026.** Submissions received after April 1, 2026 may be subject to a **\$100 late processing fee** to cover the additional time and resources required for last-minute preparation.

Questions? Call us at **(440) 886-0400**. We're excited to continue working with you and wish you a happy, healthy, and prosperous 2025!

# CLIENT INFORMATION SHEET

(Please complete a separate sheet for each individual we are preparing a tax return for)  
(You may also upload this document to your client portal)

Taxpayer Name	
Address	
City, State	
Phone Number	
Email Address	

**If your current address is different from your prior year's tax return, please document the date of move:** \_\_\_\_\_

**Did you have a change in marital status in 2025?** If so, please indicate the date of the change and the status:

Date of change: \_\_\_\_\_ Married  Divorced  Widowed

**Did you gain new Dependents in 2025?** If yes, please provide the following:

Name \_\_\_\_\_ SSN: \_\_\_\_\_ DOB: \_\_\_\_\_

Name \_\_\_\_\_ SSN: \_\_\_\_\_ DOB: \_\_\_\_\_

**Did you receive an Identity Protection Pin?** If so, please provide the name & pin number:

Name: \_\_\_\_\_ Pin #: \_\_\_\_\_

## Driver's License Information:

Name	Issuing State	ID #	Issue Date	Expiration Date

**Crypto Transactions:** At any time during 2025, did you: (a) receive crypto as a reward, award, or compensation; or (b) sell, exchange, gift, or otherwise dispose of a digital asset? YES  NO

**MANDATORY-Direct Deposit:** The IRS has discontinued issuing paper check refunds. All refunds are now processed via direct deposit, and a valid bank account is required.

Type Account (circle selection)	Checking	Savings
Routing Number		
Account Number		

## Delivery Options:

- Pick up completed return at our office
- Mail completed return (additional shipping/handling fee of \$25)