GREGORY L BUHROW, CPA, PC

Tax Year: 2025

Very Important > Answer each applicable item

Client Name: ______________________ **Spouse Name:** ______________________

◉ Married Filing Jointly ○ Single ○ Head of Household ○ Married Filing Separately

Required contact information:

Email > __________________________ Contact phone > _____________________

Driver license > ☐ Client copy included ☐ Spouse copy included (State, Number, Issue and Expiration date)

Tax return copies > ☐ 2024 ☐ 2023 ☐ Already provided (*One year mandatory*)

IRS Correspondence > ☐ None ☐ Notices (*please provide*) ☐ Identity-theft PIN

☐ Okay for IRS to discuss processing of return with preparer (*lasts for one year, until 4/15/2026*)

☐ **Mail to client** (Postage applies) ☐ **Email via secure portal**

☐ **Estimated tax PAID >** ☐ Payment records attached

E-Filing: PIN signature: ☐ First 5 digits of SSN OK? If **No**, then: Taxpayer ________ Spouse ________

Refunds/Amounts Due > Note: Paper checks *no longer used* after 9/30/2025

Refund: ☐ Direct deposit ☐ Apply to next year **Due:** ☐ Direct debit ☐ IRS Pay ☐ EFTPS

Bank account: ☐ Checking ☐ Savings ☐ Copy of voided check ☐ Use same account for Fed/state

►► **Routing number**: __________________ **Account number:** ____________________________

Other income? ☐ No ☐ Yes $_________ ☐ Documentation attached

Cryptocurrency? ☐ No ☐ Yes ☐ 8949 from broker **Foreign bank acct?** ☐ No ☐ Yes ____________

☐ Child with: ☐ Earned Amount $ _____________ ☐ Unearned income Amount $ _____________

☐ Unemployment compensation $__________________ State: ____ (include Form 1099-G)

☐ **Standard Deduction** MFJ - $31,500; Single - $15,750; HOH - $23,625; > 65 +$1,600/$2,000

Itemized Deductions ☐ Form 1098 ☐ Property tax (paid in 2025) ☐ Charitable contributions

☐ Sales tax ☐ State Income Tax ☐ Casualty in declared disaster area

☐ Medical expenses ☐ Summary documentation for each included

Credits/Other

☐ Home office: ☐ Regular and exclusive use Sq footage _________ Total home sq ft ___________

☐ EITC/CTC/ODC Any additional credits? ☐ Residential ☐ Vehicle ___________________________

☐ College: AOTC/LLC ☐ Form 1098-T plus ☐ List of all college expenses $____________ (Excel)

For **Traders in Securities** > ☐ Trading expenses

For **Mark-to-Market Traders** > ☐ MTM Election included ☐ Making MTM Election for 2026 (by 4/15/2026)

Trading entity exists: ☐ Yes ☐ No; Beneficial Ownership Information Reporting required (but on hold)

Additional information: ____

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