

2025 Client Confirmation Form

Name: _____ Spouse Name: _____

Phone: _____ Spouse Phone: _____

Email: _____ Spouse Email: _____

Primary Contact: Me My Spouse

Preferred Contact Method: Phone Email Text

During 2025, did you...

Yes No Did you **move in 2025**? *If so, NEW MAILING ADDRESS?* _____
If so, what was the **date of move** in 2025? _____

Yes No **BUY or SELL real estate** in 2025? *(Bring closing paperwork.)*

Yes No **REFINANCE a mortgage** in 2025? *(Submit closing disclosure/settlement statement.)*

Yes No **START A NEW JOB** in 2025? *If so, explain:* _____

Yes No Have any **NEW INCOME / SIDE BUSINESS startup**? *If so, explain:* _____

Yes No Invest in any **CRYPTOCURRENCY**?

Yes No Did you buy **HEALTH INSURANCE** on the **MARKETPLACE WEBSITE / HEALTHCARE.GOV**? *(Submit 1095-A)*

Yes No Did your **DEPENDENTS** change (new baby? child leave home? etc.) _____

Yes No Did each **DEPENDENT live with you all year** (except for time away at college)?

Yes No Did your **MARITAL STATUS** change? *If so, explain:* _____

Yes No **If you have a child born in 2009-2025**, do you want us to add Form 4547 to your tax return to request a Trump Account be opened for each eligible child?

Yes No **If you had a newborn child in 2025**, do you want us to request registration for the Pilot Program in which The U.S. Treasury contributes \$1,000 to their Trump Account?

Any other notes? Do you expect any changes in 2026?

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If you get a refund...

- Deposit to **same account as last year**
Last 4 digits: _____
- Deposit to this account:
Bank Name: _____
Routing # : _____
Account # : _____
Account Type: Checking Savings
- Apply forward as a credit to my 2026 taxes

If you owe taxes...

- ← Setup direct debit from **same account as deposit**
 - Setup electronic payment from this bank account:
Bank Name: _____
Routing #: _____
Account # : _____
Account Type: Checking Savings
Process payment:
 When I sign forms **OR**
 On the deadline: **Wednesday, 4/15/2026**
- ***Nothing is debited until you review your tax return and sign your e-file forms. Debits have a separate authorization form, showing debit date.*
- I will set up my own payment at [IRS.gov/payments](https://www.irs.gov/payments) or [MyAlabamaTaxes.alabama.gov](https://www.MyAlabamaTaxes.alabama.gov)

Please note the IRS is no longer accepting checks or sending checks

I signify that I have provided (or agree to provide) a document for every type of income I had this year, and the above information is accurate to the best of my knowledge. SIGNATURE: _____ DATE: _____