

**** IMPORTANT ****
**** NEW 2025 TAX YEAR CHANGES ****

UNDER THE NEW ONE BIG BEAUTIFUL BILL ACT (OBBBA), THERE ARE SOME NEW TAX LAW CHANGES WHICH MAY REQUIRE SOME NEW INFORMATION BE PROVIDED. PLEASE ANSWER THE FOLLOWING QUESTIONS AND PROVIDE THE INFORMATION TO THE BEST OF YOUR KNOWLEDGE SO THAT WE MAY UPDATE YOUR RETURN WITH ALL REQUIRED INFORMATION:

TIP INCOME

DID YOU OR YOUR SPOUSE RECEIVE ANY TIPS AS PART OF YOUR INCOME?

YES

NO

IF SO, WHAT WAS YOUR OCCUPATION AT THE TIME YOU EARNED YOUR TIP INCOME?

SPOUSE (IF APPLICABLE)

DID YOUR EMPLOYER REPORT YOUR TOTAL TIP INCOME ON YOUR W-2 AND/OR FORM 1099?

YES

NO

IF YOUR W-2 AND/OR FORM 1099 DOES NOT PROVIDE YOU WITH YOUR TOTAL TIP INCOME, WHAT WAS YOUR ANNUAL TOTAL TIPS RECEIVED?

\$ _____

\$ _____ SPOUSE (IF APPLICABLE)

OVERTIME INCOME

DID YOU OR YOUR SPOUSE HAVE ANY INCOME ON YOUR W-2 WHICH WAS PART OF OVERTIME EARNINGS?

YES

NO

****IMPORTANT** IF SO, PLEASE BE SURE TO INCLUDE THE FINAL PAYSTUB RECEIVED FROM YOUR EMPLOYER IN 2025 SO THAT WE MAY REPORT YOUR OVERTIME EARNINGS.**

VEHICLE INTEREST DEDUCTION

DID YOU PURCHASE A BRAND-NEW VEHICLE IN 2025 FOR PERSONAL USE AND PAY LOAN INTEREST ON IT?

YES

NO

IF SO, PLEASE BE SURE TO INCLUDE A COPY OF YOUR VEHICLE SALES RECEIPT WHICH INCLUDES THE MAKE, MODEL, AND VIN NUMBER FOR THE VEHICLE. ADDITIONALLY, WHAT WAS THE TOTAL INTEREST PAID ON THE VEHICLE IN 2025? \$ _____

MODERNIZED DIGITAL PAYMENTS

UNDER EXECUTIVE ORDER 14247, THE INTERNAL REVENUE SERVICE IS TRANSITIONING TO A DIGITAL PAYMENT SYSTEM. ALL REFUNDS ARE REQUIRED TO BE DIRECTLY DEPOSITED TO YOUR BANK ACCOUNT. IF WE DO NOT HAVE YOUR CURRENT BANK ACCOUNT INFORMATION ON FILE, PLEASE PROVIDE THE FOLLOWING:

BANK NAME: _____

ROUTING #: _____

ACCOUNT #: _____

CHECKING OR SAVINGS ACCOUNT? _____

YOUR PRINTED NAME: _____

SPOUSE (IF APPLICABLE): _____