

CLA Client Drop Off Information Sheet

New Clients 2025

(Please Print Clearly)

Rcvd By: _____

Date: _____

Legal Name _____ SSN _____ DOB _____

Driver's License/State ID(circle) _____ Iss. date _____ Exp. date _____

Your Address _____ City/State _____ Zip Code _____

Contact Number _____ Email Address _____

Current Occupation _____ Referred by: _____

Spouse's Legal Name _____ SSN _____ DOB _____

Driver's License/State ID _____ Issue Date _____ Exp. date _____

Contact Number _____ Email Address _____

Spouse's Occupation _____

Please fill in the blanks or circle yes or no.

1. Do you have dependent children? Or other dependents you claim? (Use back of sheet if multiple)

No - go to question 2.

Yes- Provide Name, SSN, Male/Female & DOB of dependent(s)? _____

2. Do you rent or own your home?

Own – Did you bring your 1098 Mortgage Interest Statement and/or Real Estate Taxes paid last year? **Yes or No**

Rent – go to question 3.

3. Did you sell your home this year?

No – go to question 4.

Yes- Did you bring your Settlement Statement from the sale of your home. Did you live in this home as your primary residence for 2 consecutive years out of the past 5 years? **Yes or No**

4. Did you move this year? (**Military only**)

No – go to question 5.

Yes – Did you move to a different state? If yes, are moving expenses and date of move included?

5. Did you have any forgiveness or cancellation of debt last year? (1099A or C)

No – go to question 6.

Yes- Did you bring in your 1099-C form?

6. Did you have any other income this year?

No – go to question 7.

Yes- Please circle all that apply. Interest Income(1099INT), Dividend Income(1099DIV), Retirement Withdrawal (1099R), Alimony, Unemployment Compensation (1099G), Stock sales (1099B), Social Security Benefits (SSA-1099).

Do we have all appropriate 1099's to claim this income properly on your return? If stock sales, do we have the original purchase price and date for each investment sold.

7. Did you get paid overtime in 2025?

No – go to question 8.

Yes- If it's not on your W2 box 14, please provide your last paystub of 2025.

8. Did you make a QCD (qualified charitable distribution) from your retirement in 2025?
No – go to question 9.
Yes- Please provide proof of the QCD contribution
9. Did you receive distributions from a Health Savings Account (HSA)? (If you have a W in box 12 on your W2, you have an HSA)
No – go to question 10.
Yes- Please provide the 1099-SA form
10. Do you have, or did you buy rental property this past year?
No – go to question 11.
Yes – Did you bring your properties income, repair expenses, insurance, mortgage interest, utility expenses or any other expenses you had on this property last year?
11. Do you own your own business?
No – go to question 12.
Yes – Did you bring your list of income and expenses for your business?
Did you use your home as an office or storage space? Square Footage of whole home_____ Square Footage of business use_____.
Did the owner contribute to a SEP IRA or traditional IRA?
Did the owner pay health insurance premiums in 2025?
12. Did anyone in your household have education expenses last year (tuition or student loan interest)? The education expense can be for grade level, college, private/public school.
No- go to question 13.
Yes – Did you include in your documents the 1098-T and/or 1098-E forms (for college), any out-of-pocket expenses for tuition, books, supplies (your out-of-pocket expenses includes student loan amounts) for this past year. Did your employer reimburse any of these expenses? If **YES** how much?
13. Did you contribute to a 529 Bright Start, Bright Directions or College Illinois program for a child, grandchild or someone else?
No – go to question 14.
Yes- We need the account number_____ and amount contributed_____
14. Did you have any **cash, check, or noncash contributions** (goodwill etc.,) this past year?
No- go to question 15.
Yes- Did you fill out a donation sheet with FMV filled out on it for non-cash donations and bring any receipts for proof of cash donations?
15. Did you have any large medical expenses for you or any of your dependents this past year?
No – go to question 16.
Yes – Did you bring the medical, dental, Rx, hospital expenses which you paid out of pocket as well as mileage to and from medical events listed above.
16. Did any of your dependents have childcare/daycare expenses for this past year?
No – go to question 17.
Yes – Do you have the amount you paid to the daycare, their EIN number and address?

17. Did you make any purchases during the year that included a significant amount of sales tax? (car, boat, motorcycle)
No – go to question 18.
Yes – What was the amount of sales tax? _____
18. Did you purchase a new American made vehicle via a loan in 2025? (This does not apply to used vehicle purchases or leases)
No – go to question 19.
Yes- The loan interest is deductible, please provide that amount?
What is the vehicle VIN number?
19. Did you purchase health insurance from the Marketplace in 2025?
No – Continue to question 20.
Yes – Did you bring in your **1095-A** form which is required for filing taxes?
20. Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency and/or virtual assets (crypto-currency or NFT's)?
No – Go to question 21.
Yes – Did you bring your purchase\sale information? (See receptionist for Cryptocurrency Questionnaire)
21. Did you purchase external doors, windows, water heater, furnace, air conditioner (solar or geothermal) or insulation for your **primary residence** in 2025?
No – go to question 22.
Yes – What did you purchase? _____ What is the amount? _____
22. Did you purchase Solar Panels for **your primary residence**?
No – go to question 23.
Yes – Are they operational? (did you bring your purchase paperwork?)
23. Did you purchase a clean/electric vehicle before September 30, 2025? (fuelconomy.gov and irs.gov/cleanvehicles)
No – go to question 24.
Yes – What did you purchase? _____ What is the amount? _____
VIN #? _____
24. Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft?
No – go to question 25.
Yes- Please provide the IRS letter. You can also access the IP PIN online using your irs.gov account
25. **The IRS has phased out refunds and tax payments issued by mail.** Please provide your banking information for electronic payments and deposits.
No – expect paper check refunds to take between 6-8 weeks
Yes – **CHECKING or SAVINGS (please circle)**
Bank Name _____
Routing Number _____
Account Number _____
- * NOTE: CEFCU Account Numbers MUST be 10 digits. Please include the full account number including any additional digits before OR after your account number (typically 01 or 000). **

Any comments you have for us to prepare your tax return more accurately that were not covered above: