

Burlington Business Solutions LLC
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Information to bring to your tax appointment or include in your drop off or email

☐ 1. If your tax return was not prepared by Burlington Business Solutions LLC you must must provide the following:
Please provide a copy of 2024 Tax Return and Social Security Cards.
All clients must bring Driver Licenses

☐ 2. Please Provide Contact Number and Email Address:

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<input type="checkbox"/>	3	Name	Social Security #	Date of Birth
		TaxPayer		
		Spouse		
		Child		
		Child		

☐ 4. Occupation

Taxpayer
Spouse

☐ 5. Day Care Provider

Name
Address
Federal ID#

☐ 6. Did you ,your spouse or dependent take any higher education courses in 2025?

Please provide 1098T

☐ 7. E-file information: Bank Name

9 Digit Routing #
Account #

☐ 8. All W2's for both taxpayer and spouse, PLEASE PROVIDE LAST PAYSTUB!

☐ 9. Did taxpayer or spouse receive any funds from a pension or Annuity? (1099-R)

☐ 10. Did you receive a State Refund for 2024?

☐ 11. All 1099INT and 1099DIV for Interest/Dividends

☐ 12. Did taxpayer or spouse collect unemployment in 2025? Extra Unemployment Stimulus Received?
(This form will no longer be mailed- please print off State of NJ Website 1099 G)

☐ 13. Did taxpayer or spouse receive any social security benefits in 2025?
(If YES bring SSA-1099)

☐ 14. Does taxpayer or spouse have any business on the side?
(If you accept any electronic payments please bring in 1099-K) PayPal Facebook Market Place Venmo etc. over \$5000.00.

☐ 15. If you have a business do you use a room in your home for an office?(only for Schedule C or 1099 Contractors)

☐ 16. Do you own rental properties?
(If YES bring all rental information) All Rental owners are required to issue 1099's for service work.

☐ 17. Are you a partner in a business or do you have any affiliation with a corporation?
(If Yes bring K-1)

☐ 18. At any time during 2025 did you:(a) receive(as a reward, award, or payment for property or services);or (b) sell,exchange, gift, or otherwise dispose of a digital asset (or financial interest in digital asset)?
(If yes bring 1099B, Must have original purchase date, original purchase price, date of sale price for each transaction sheet.)

☐ 19. Did you buy/sell your home?
(Bring Original settlement sheet from the purchase of the home just sold.
Bring a list of any improvements and cost made over the years you owned your home.)

☐ 20. Did you have any gambling winnings and losses?
(If Yes bring all W-2G's)

☐ 21. Medical Expenses: Doctors, Dentists, Pediatricians, etc.(1095A)
Pharmacy, Medical supplies, and insurance costs. Please bring form 1095A for Market Insurance.
☐ Do you have health care coverage?

☐ 22. Do you own your home?
☐ Mortgage Interest:
☐ Real Estate Taxes:
☐ PMI:
☐ Home Equity Loans

☐ 23. Any out of state purchases? These items are subject to NJ USE TAX.

☐ 24. Contributions or donations in the form of cash or check?

☐ 25. Contributions or donations in the form of food, clothes, household items, Etc.?

☐ 26. Did you make any estimated tax payments for the year 2025?

☐ 27. If you are a renter, what is the total rent paid in 2025?

☐ 28. If you have been a victim of tax scam and reported it to the IRS you MUST BRING YOUR PIN
to E-file your 2025 tax return.

☐ 29. Please bring a copy of DD214 for Veterans exemptions (Only for veterans that did not apply previous)
You do not have to reapply each year.
NJ Deduction has a 6500 for 2025

☐ 30. Did you have any Foreign Income for 2025?

☐ 31. Residential Renewable Energy Tax Credit (Solar, Wind,Geothermal, and Fuel-cell Technology)
Windows Doors Heater Airconditioning Hotwater Heater

☐ 32. NEW AUTO CAR LOAN INTEREST FORM (must have VIN # and loan form)

Business Clients for 2020:

		<u>Hourly Rate</u>	<u>Hourly Tip Rate</u>
1	Minium Wage will Increase January 1, 2021	\$ 12.00	
	Tipped Employees will Increase January 1, 2021	\$ 4.13	\$ 7.87
2	NJ Sales Tax for January 1, 2021	6.625%	
3	We will need to know if you received the following: SBA Advance Loan SBA Loan Payroll Protection (Did you file for Forgiveness?) NJ Grant Funds Local Grant Funds		
4	All 1099's must be processed by January 31, 2021.		
5	All W-2's must be filed by January 31, 2021		
6	For NJ Taxpayers who do not have health insurance please apply for a exemption: https://nj.gov/treasury/njhealthinsurancemandate/exemptions.shtml		