

2025 Income Tax Intake Form

Please complete this form to the best of your ability. Feel free to skip a portion if you feel it doesn't pertain to your situation. As always, don't hesitate to contact Crystal Consulting with any questions

* Indicates required question

1. Please List preferred Name, Address, Email and Telephone number

2. Did I provide tax preparation services for you in 2024? (If so, complete Name/Contact info section and skip to the dependents section. Only dependents NOT on your tax return for 2024 need to be added)

Mark only one oval.

- ☐ Yes (skip to dependent section unless marital changes have occurred)
- ☐ No (continue with question 2)

3. Taxpayer Full Legal Name *

4. Taxpayer Social Security Number

5. Taxpayer Date of Birth

Example: January 7, 2019

6. Taxpayer Occupation

7. Spouse's Full Legal Name

8. Spouse's Social Security Number

9. Spouse's Date of Birth

Example: January 7, 2019

10. Spouse's Occupation

11. Dependent #1 Name, SSN, Date of Birth, Relationship to tax payer

12. Did you provide at least half dependent #1's financial support in 2025?

Mark only one oval.

☐ Yes

☐ No

13. Dependent #2 Name, SSN, Date of Birth, Relationship to tax payer

14. Did you provide at least half dependent #2's financial support in 2025?

Mark only one oval.

☐ Yes

☐ No

15. Dependent #2 Name, SSN, Date of Birth, Relationship to tax payer

16. Did you provide at least half dependent #3's financial support in 2025? (It space is need for more dependents, please list on last page)

Mark only one oval.

☐ Yes

☐ No

17. Did you have any sources of income besides your primary employment last year? If So, please provide details in "other" field

Mark only one oval.

☐ NO

☐ Other: _____

18. Did you make any significant financial transactions last year? (e.g. sale of property, inheritance ect). If so, please provide details in "other" field

Mark only one oval.

☐ NO

☐ Other: _____

19. If you are due to receive a refund, please indicate how you would like the refund paid.

Check all that apply.

☐ Paper Check

☐ Direct Deposit

20. If you are due to pay a balance, please indicate how you would like the balance due paid.

Check all that apply.

☐ Paper Check

☐ Automatic Withdrawal

21. If direct deposit or automatic withdrawal selected above please include bank name, Routing and Account number below

22. Were you and your spouse US citizens or resident aliens for all of 2025?

Mark only one oval.

☐ Yes

☐ No

23. Did any dependent file a joint return with another person in 2025 or file their own tax return?

Mark only one oval.

☐ Yes

☐ No

24. Did the dependents live with you in the United States for over half of 2025? (You are not eligible to claim EIC for a child who didn't live with you for more than half of the year, even if you paid most of his or her living expenses)

Mark only one oval.

☐ Yes

☐ No

25. Could dependents also meet the qualifications to be a qualifying child for another tax payer? (Sometimes a child meets the tests to be a qualifying child for more than one person. However, only one of these individuals can treat the child as a qualifying child.

Mark only one oval.

☐ Yes

☐ No

26. The following is a list of possible documents you may need to provide in order to prepare your tax return. Please check all you feel may apply. You may deliver these to me directly or email them.

Check all that apply.

☐ Income Statement: W-2s, 1099s etc

☐ Interest, Tax & Education statements: 1098s, property tax, vehicle registration etc

☐ Child care statements

☐ HSA/FSA statements

☐ Health insurance statements (Either 1095-a or payment of private insurance)

27. Standard deduction for 2025 is \$15,000 per person (\$30,000 married filing jointly), and \$22,500 for Head of Household. If you believe you may benefit from itemizing rather than taking the standard deduction, please provide sources of these itemizations. They may include, but are not limited to

Check all that apply.

☐ Medical Payments/Bills

☐ Donation receipts

☐ Casualty & Theft losses

28. Please check any that apply below, as you maybe eligible for special state credits.

Check all that apply.

☐ First responder/Firefighter

☐ Teacher

☐ Retired Peace Officer

29. Please list anything else you'd like me to know or to be considered upon completing your tax return.

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