



## 2025 PERSONAL TAX INTAKE FORM

Taxpayer's Name: \_\_\_\_\_ Spouse's Name: \_\_\_\_\_

Taxpayer's Email: \_\_\_\_\_ Spouse's Email: \_\_\_\_\_

Taxpayer's Phone: \_\_\_\_\_ Spouse's Phone: \_\_\_\_\_

Preferred point of contact:  Taxpayer  Spouse

### The following questions are in relation to the last known tax return you have filed with the government:

Marital Status: \_\_\_\_\_ Did your status change in 2025?  NO  YES

Number of Children being Claimed: \_\_\_\_\_ Did this number change in 2025?  NO  YES

Has your address changed?  NO  YES (please add this below)

Your Address: \_\_\_\_\_

Taxpayer's Occupation: \_\_\_\_\_ Spouse's Occupation: \_\_\_\_\_

Primary bank account for electronic tax refunds/balances due: RAC has on file (account ending): \_\_\_\_\_

Bank Name: \_\_\_\_\_  Checking  Savings

Account Number: \_\_\_\_\_

Routing Number: \_\_\_\_\_

### Income Tax Refund/Balance Due Preferences:

Federal Balance Due:	<input type="checkbox"/> Withdraw from my bank account
Federal Refund Owed:	<input type="checkbox"/> Direct Deposit <input type="checkbox"/> Apply to my estimated payment

State Balance Due:	<input type="checkbox"/> Withdraw from my bank account
State Refund Owed:	<input type="checkbox"/> Direct Deposit <input type="checkbox"/> Apply to my estimated payment

**IMPORTANT:** If you or your spouse are a new client or if your Driver's License was renewed or updated in the past year, please attach a copy of both the front and back of the license to this form.

### ANNUAL QUESTIONS

At any time during 2025, did you or your spouse:

- Buy, receive, sell, exchange, or otherwise dispose of any cryptocurrency?  
*Please provide form 1099-DA as we will need a list of all taxable transactions, [www.rac-co.com/crypto](http://www.rac-co.com/crypto)*  NO  YES
- Make any Energy Efficient Home Improvements? (Includes second homes now)  
*If yes, please provide statement/receipts*  NO  YES
- Make any solar, fuel cell, geothermal, or wind-powered improvements to your primary residence?  
*If yes, please provide statement/receipts*  NO  YES
- Purchase an electric or fuel cell vehicle?  
*If yes, please provide statement/receipts*  NO  YES
- NEW** In 2025, did you purchase a new vehicle, for personal use, that you are paying loan interest on?  
*If yes, we will need the purchase statement, the year-end bank statement showing the annual amount of interest paid, and enter the VIN number here:*  NO  YES
- Make any payments on student loans?  
*If yes, please provide form 1098-E*  NO  YES

**At any time during 2025, did you or your spouse – Continued:**

7. Receive any unemployment income?  NO  YES  
*If yes, please provide form 1099-G*
8. Get your health insurance through the marketplace?  NO  YES  
*If yes, please provide form 1095-A (we do not need forms 1095-B or 1095-C)*
9. Pay for long-term care insurance?  NO  YES  
*If yes, please provide statements/receipts*
10. Have any interests in or are a member/partner of a business that you will receive a K-1?  NO  YES
11. **NEW** Did you work in an occupation where you customarily and regularly received Tip income?  NO  YES  
*If yes, did you have tip income you did not report to your employer? If yes, please provide Form 4137.*
12. **NEW** Did you work and get paid for any overtime in 2025?  NO  YES  
*If yes, we will need the final pay stub for the year.*
13. Make any contributions to an HSA **outside of payroll**?  NO  YES  
*If yes, please provide form 5498-SA*

13A. Taxpayer contribution HSA plan type:	<input type="checkbox"/> Single Plan <input type="checkbox"/> Family Plan	Amount Contributed: \$ _____
13B. Spouse contribution HSA plan type:	<input type="checkbox"/> Single Plan <input type="checkbox"/> Family Plan	Amount Contributed: \$ _____

14. Spend any funds from your HSA throughout the year?  NO  YES  
*If yes, please provide form 1099-SA*

14A. Were all the funds used for qualified medical expenses?	<input type="checkbox"/> NO <input type="checkbox"/> YES
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15. Make any contributions to an IRA?  NO  YES  
*If yes, please provide form 5498 if available (sometimes this form will not be available until May)*

15A. Taxpayer Retirement Account Type:		Amount Contributed: \$ _____	
<input type="checkbox"/> Traditional IRA	<input type="checkbox"/> Roth IRA	<input type="checkbox"/> SEP IRA	<input type="checkbox"/> SIMPLE IRA
15B. Spouse Retirement Account Type:		Amount Contributed: \$ _____	
<input type="checkbox"/> Traditional IRA	<input type="checkbox"/> Roth IRA	<input type="checkbox"/> SEP IRA	<input type="checkbox"/> SIMPLE IRA

16. Receive an Identity Theft PIN number?  NO  YES  
*If yes, please provide letter(s)*
17. Have an interest or signature authority over any foreign financial banks that had an aggregate value of \$10,000 or more during the calendar year?  NO  YES

17A. If yes, you have an obligation to file form FinCEN114. Would you like RAC to prepare this for you?	<input type="checkbox"/> NO <input type="checkbox"/> YES
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18. **For NYS Residents Only:** Did you receive the NYS Inflation Refund check in 2025?    
*If yes, enter the amount received here: \$ \_\_\_\_\_*

19. **For NYS Residents Only:** Maintain living quarters in NYC any time during the year?  NO  YES  
*If yes: Month \_\_\_\_\_ to Month \_\_\_\_\_*

20. Were you an educator? Eligible Teachers & Educators may deduct up to \$300 for unreimbursed classroom expenses.  NO  YES  
*If yes, please provide statements/receipts*

20A. If yes, who was the educator?	Amount of Qualified Expenses: \$ _____
<input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Both	

21. **For NYS Residents Only:** Were you a volunteer firefighter any time during the year?  NO  YES

21A. If yes, who was the firefighter? Company/Dept.: _____ Address: _____	
<input type="checkbox"/> Taxpayer <input type="checkbox"/> Spouse <input type="checkbox"/> Both	

22. Did you make any estimated tax payments?  NO  YES  
*If yes, please provide payment details below AND include proof of payment with your documents:*

Federal Amount	Date Paid	State Amount	Date Paid

**BUSINESSES, FARMS & PARTNERS OF A PARTNERSHIP**  
 (For Schedule C & F Filers Only - All others can skip this section entirely)

Name of Entity/Activity: \_\_\_\_\_ EIN: \_\_\_\_\_

Who does this Entity/Activity belong to?  Taxpayer  Spouse  Both

1. What accounting software do you use to track your business or farm activity?  
 QuickBooks Online\*  Excel/Google Sheets  Other \_\_\_\_\_  
 QuickBooks Desktop\*\*  None (please provide us with all relevant activity, information and details)

*\*If using QuickBooks Online, please add us as your accountants using [OASTeam@rac-co.com](mailto:OASTeam@rac-co.com)*

*\*\*If using QuickBooks Desktop or an excel spreadsheet, please provide a copy of all necessary files*

2. Did you have any business or farm activity in 2025 that was **not held** by a partnership or S-Corporation?  NO  YES  
*If yes,  I had a business  I had a farm  I had both*
3. Did you sell/dispose or trade in any assets in 2025 that were used for business purposes in prior years?  NO  YES  
*If yes, please provide all necessary information relating to this transaction*
4. Did you buy or inherit any assets in 2025 that were used by or for your business or farm during 2025?  NO  YES  
*If yes, please provide all necessary information relating to this transaction*
5. Did you close or sell your business, farm or partnership interest in 2025?  NO  YES  
*If yes, please provide closing documents.*
6. Did you receive the Employee Retention Credit in 2025?  NO  YES  
*If yes, amount received: \_\_\_\_\_*
7. Fill out the below sections if you are a **partner of a partnership** (K-1), a **farmer** (Schedule F) or **business owner** (schedule C):

Apply the information below to:  My Business: \_\_\_\_\_  My Farm: \_\_\_\_\_  My K-1 (1065): \_\_\_\_\_

**Home Office Deduction**

Square footage of home (livable): \_\_\_\_\_  
 Square footage of your home office: \_\_\_\_\_  
 Home insurance: \$ \_\_\_\_\_  
 Utilities: \$ \_\_\_\_\_  
 Internet service: \$ \_\_\_\_\_  
 Repairs and Maintenance: \$ \_\_\_\_\_  
 Cell phone: \$ \_\_\_\_\_

**Mileage Deduction Information**

Year: \_\_\_\_\_ Make: \_\_\_\_\_ Model: \_\_\_\_\_  
 Date placed in service: \_\_\_\_\_  
 Total miles driven for the year\*\*: \_\_\_\_\_  
 Business miles driven for the year: \_\_\_\_\_  
 Car loan interest paid in 2025: \$ \_\_\_\_\_  
*\*\*This is the difference between your odometer read as of January 1 and December 31st*  
*If you have mileage for more than one activity, please add this information to **Other Notes and Comments** below*

**NOTES & OTHER RELEVANT INFORMATION (Use this section if you need more space than already provided)**


**REAL ESTATE RENTALS (LANDLORDS)**  
 (For Schedule E Filers Only - All others can skip this section entirely)

Physical Address of Property: \_\_\_\_\_

Is this property held in an LLC?  Yes (fill out below):  No, but I would like it to be  No, and I'm okay with that

Name of LLC: \_\_\_\_\_ EIN: \_\_\_\_\_

**Type of Property:**

- Single-Family Residence     Multi-Family Residence     Vacation/Short-Term Rental     Commercial  
 Land     Royalties     Self-Rental     Other \_\_\_\_\_

Who does this rental property belong to?     Taxpayer     Spouse     Both

- What accounting software do you use to track your real estate rental activity?  
 QuickBooks Online     Excel/Google Sheets     Other \_\_\_\_\_  
 QuickBooks Desktop     None (use the Rental Activity section below for each rental you own)
- Did you have any rental activity in 2025 that was **not held** by a partnership or S-Corporation?     NO     YES  
*If yes,     I had one rental     I had multiple rentals (please use a new sheet for each rental property)*
- Did you sell/dispose or trade in any assets in 2025 that were used for your rental(s) in prior years?     NO     YES  
*If yes, please provide all necessary information relating to this transaction*
- Did you buy or inherit any assets in 2025 that were used by or for your rental property(ies) during 2025?     NO     YES  
*If yes, please provide all necessary information relating to this transaction*
- Did you buy or sell any rental properties during 2025?     NO     YES  
*If yes, please provide closing documents and all necessary and pertinent information.*
- Did you have an outstanding mortgage on any rental property(ies) that you own as of the end of the year?     NO     YES  
*If yes, please provide all balances and interest expense details.*
- Did you make any payments requiring Form 1099?     NO     YES  
*If yes, did you or will you file the necessary Form(s) 1099?     NO     YES*
- Only for those who said "None" to Question 1 above:** Use the below section to report all financial information relating to your rental property(ies):

**RENTAL ACTIVITY BY PROPERTY**  
 (for additional rentals, please contact us for a template: [info@rac-co.com](mailto:info@rac-co.com))

Physical Address of Property:  Use the one listed above \_\_\_\_\_

General Information:	Expenses
Number of Fair Rental Days: _____	Advertising: \$ _____
Number of Personal Use Days: _____	Cleaning & Maintenance: \$ _____
Rents Received (for the year): \$ _____	Commissions: \$ _____
Royalties Received (for the year): \$ _____	Insurance: \$ _____
Mileage Deduction Information:	Legal and Professional: \$ _____
Year: _____ Make: _____ Model: _____	Management Fees: \$ _____
Date placed in service: _____	Mortgage Interest: \$ _____
Total miles driven for the year*: _____	Repairs: \$ _____
Business miles driven for the year: _____	Supplies: \$ _____
<small>*This is the difference between your odometer read as of January 1 and December 31st</small>	Property Taxes: \$ _____
New Asset Information:	Utilities: \$ _____

Description of Asset Purchased    Date Purchased    Cost (\$)

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**IMPORTANT DEADLINES**

If you wish to have RAC file your tax return by the filing deadline of April 15, 2026, then we need all of your tax documents and materials by no later than Tuesday, March 25, 2026.

**Tax return preparation will not begin until all required materials have been received.**

If you need more time this year, please don't wait to request that we file an extension for your personal return. You can request that we file this extension any time before and up to April 15<sup>th</sup>, 2026, online here: <https://www.rac-co.com/1040extension>

**ENGAGEMENT & SIGNATURE**

*By signing this form and/or submitting your tax documentation to us, you are agreeing to the terms and conditions of our Personal Income Tax Engagement Letter available on our website at: <https://www.rac-co.com/1040>*

Signature of Taxpayer or Spouse: \_\_\_\_\_ Date: \_\_\_\_\_ RAC Initials: \_\_\_\_\_

**MISSING ITEMS AT DROP OFF [FOR OFFICE USE ONLY]**

<u>TAX DOCUMENT OR INFORMATION</u>	<u>NOTES</u>
1.	
2.	
3.	
4.	
5.	
8.	

You can drop off your documents to our office or submit your documents online using the upload link at [www.rac-co.com](http://www.rac-co.com)



## 2025 Personal Income Tax Checklist

**Checklist Instructions:** Please review the list of all income, adjustments, deductions, and credits listed below and the total number of each form that applies to your household for 2025. We will need you to provide the respective supporting documentation for each item as it is listed in the “Required forms and documentation” column.

<b>INCOME: Required Forms/ Documentation:</b>	<i># of forms</i>
W-2 (Employer/Paycheck)	
SSA-1099 (Social Security)	
1099-G (Unemployment)	
1099-INT (Interest)	
1099-DIV (Dividends)	
1099-R (Retirement distributions)	
1099B (Cryptocurrency/virtual currency)	
1099-B (Consolidated Statement/Investment Activity)	
1099-SA (Health Savings Account (HSA))	
W2-G (Gambling)	
K-1 (Privately Held Corporations/Partnerships) <input type="checkbox"/> RAC prepares this for me	
<b>Small Business/Real Estate/Rental/Farm</b> (2025 income statement, balance sheet and asset schedule)	
1099-Q (Qualified Tuition Program)	
1099-C (Forgiven Debt or Foreclosure)	
1099-K (Third Party Network Sales/Income)	
1095-A (Marketplace Health Insurance)	
Other:	

<b>DEDUCTIONS: Required Forms/ Documentation:</b>	<i># of forms</i>
1098 (Mortgage Statement and Property Taxes Paid)	
1099-S (Purchase and/or Sale of Real Estate (attorney-provided))	
<b>Charitable Donations</b> (Estimated value of donated items OR Receipt for cash)	
<b>Unreimbursed Employee Expenses</b> (Total amount, receipt, details)	
<b>Home Office Expenses – Self-Employed Only</b> (Square footage of office and all relevant expenses)	
<b>Mileage - Business, medical and charitable</b> (Vehicle description, total annual miles, deductible miles)	
Other:	

<b>ADJUSTMENTS: Required Forms/ Documentation:</b>	<i># of forms</i>
1098-E (Student loan payments)	
5498 (Retirement account contributions (non-payroll))	
5498-SA (Health Savings Account (HSA) contribution)	
<b>Cash Charitable Contributions</b> (Charity and donation letters)	
Other:	

<b>CREDITS: Required Forms/ Documentation:</b>	<i># of forms</i>
<b>Childcare or other dependent care expenses</b> (EIN for provider and total amounts paid for each child)	
1098-T (College Tuition – for you, spouse, or dependent)	
<b>Full-Year Firefighter or EMT Volunteer (NYS)</b> (Name & address of where you volunteered)	
<b>Certified energy efficient property purchase</b> (paid receipts)	
Other:	

<b>OTHER: Required Forms/ Documentation:</b>	<i># of forms</i>
<b>Required: All taxpayers &amp; spouses need a copy of valid Driver’s License or NYS ID card to e-file</b>	
<b>All 2025 estimated income tax payments</b> (Record of all payments made to each agency (dates & amounts))	
<b>IRS or NYS Tax Notice</b> (Complete copy of the tax notice(s))	
<b>2025 NYS STAR Tax Relief Check</b> (Amount or check stub provided by NY when you get the check)	
Other:	