

**2025**  
**PERSONAL AND INCOME INFORMATION WORKSHEET**  
**Must Be Filled In as Completely as Possible**  
**(Use Your 2024 Return as a Guide)**

Your Name \_\_\_\_\_ Your Social Security Number \_\_\_\_\_  
First MI Last  
Spouse's Name \_\_\_\_\_ Spouse's Social Security No \_\_\_\_\_  
First MI Last  
Address: \_\_\_\_\_  
Street City State Zip  
TELEPHONE NUMBERS (please include area code) Home \_\_\_\_\_ Your Work \_\_\_\_\_ Spouse's Work \_\_\_\_\_  
CELL PHONE NUMBERS (please include area code) Yours \_\_\_\_\_ Spouse's \_\_\_\_\_  
OCCUPATIONS - Yourself \_\_\_\_\_ Your Spouse \_\_\_\_\_  
DATE OF BIRTH - Yourself \_\_\_\_\_ Your Spouse \_\_\_\_\_ Email address: \_\_\_\_\_  
MO DAY YEAR MO DAY YEAR

If entire family covered by health insurance all year check here. ☐ Did you own or spend any Virtual Currency in the calendar year? ☐

At anytime throughout the year, did you have more than \$10,000 in a Foreign Bank Account? ☐

**DEPENDENT INFORMATION**

Full Name	Date of Birth	Social Security Number	Relationship	Months Lived in Your Home in 2025

Do you want any refunds due you directly deposited to your checking or savings account? \_\_\_\_Yes \_\_\_\_No If yes, is the information provided last year still accurate? \_\_\_\_Yes \_\_\_\_No (If no, we need current routing number and account number)  
(Please Bring all W-2s, Forms 1099 and Other Documents Indicating Income Received)

1. Total **WAGES** earned: (optional - we will add this up for you) \$ \_\_\_\_\_ 2. **TIPS RECEIVED** but not reported to your employer: \$ \_\_\_\_\_

3. **INTEREST INCOME:** (Please bring Forms 1099 or Year End Statements)

If you received interest income from a seller financed mortgage in 2025, bring name, address & social security number of payer—this is an IRS requirement.

Payer's Name	Amount	Payer's Name	Amount

4. **DIVIDEND INCOME:** (Please bring Forms 1099 or Year End Brokerage Statements)

Payer's Name	Gross Dividends	Payer's Name	Gross Dividends

5. **ALIMONY RECEIVED:** \$ \_\_\_\_\_. **ALIMONY PAID:** \$ \_\_\_\_\_ - SSN of Person the Alimony was Paid to - \_\_\_\_\_

6. **UNEMPLOYMENT COMPENSATION RECEIVED:** \$ \_\_\_\_\_

7. **SOCIAL SECURITY PAYMENTS** received: Yourself \$ \_\_\_\_\_ Your Spouse \$ \_\_\_\_\_

8. If you **SOLD** stocks, real estate or other assets in 2025, bring all pertinent papers. If you had **STOCK TRANSACTIONS**, please bring brokerage buy and sell slips or a detailed listing. **We need to know when you bought the stock and how much you paid for the stock!**

9. **MISCELLANEOUS INCOME** not shown elsewhere - **SOURCE:** \_\_\_\_\_ **Amount:** \$ \_\_\_\_\_

10. I have an ☐ **TRADITIONAL IRA** or a ☐ **ROTH IRA**. How much paid in 2025? \$ \_\_\_\_\_ How much paid in 2026 for 2025? \$ \_\_\_\_\_

11. If you **PURCHASED REAL ESTATE** in 2025, bring **ALL** escrow papers.

12. **ESTIMATED TAX PAYMENTS FOR 2025 (DO NOT INCLUDE WITHHOLDING FROM W-2s or BALANCE paid from the previous return)**

FEDERAL				CALIFORNIA			
Date Paid	Amount	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
1. _____	\$ _____	2. _____	\$ _____	1. _____	\$ _____	2. _____	\$ _____
3. _____	\$ _____	4. _____	\$ _____	3. _____	\$ _____	4. _____	\$ _____

**(Over for Deductions Information Worksheet) -- IF YOU ARE A NEW CLIENT,**  
**PLEASE BRING COPIES OF YOUR 2024 FEDERAL AND CALIFORNIA RETURNS**