

Please answer ALL questions provide necessary documents.

PERSONAL INFORMATION

1	Are you a returning client or a new client?	Returning	NEW	
2	Taxpayer (legal) Name	<input type="text"/>		
3	Taxpayer Social Security Number	<input type="text"/>		
4	Taxpayer Date of Birth	<input type="text"/>		
5	Taxpayer Occupation	<input type="text"/>		
6	Spouse (legal) Name	<input type="text"/>		
7	Spouse Social Security Number	<input type="text"/>		
8	Spouse Date of Birth	<input type="text"/>		
9	Spouse Occupation	<input type="text"/>		

CONTACT INFORMATION

10	Mailing Address	<input type="text"/>		
11	Taxpayer Email Address	<input type="text"/>		
12	Taxpayer Cell Phone #	<input type="text"/>		
13	Taxpayer preferred contact method? (Liscio, Email, Text, Phone Call)	<input type="text"/>		
14	Spouse Email Address	<input type="text"/>		
15	Spouse Cell Phone #	<input type="text"/>		
16	Spouse preferred contact method? (Liscio, Email, Text, Phone Call)	<input type="text"/>		

Please answer ALL questions provide necessary documents.

IDENTIFICATION

17	Please provide the Taxpayer's Driver's License or State-Issued ID.			
18	Do you have an IRS Identity PIN for 2025 tax year?	YES	NO	N/A
	Provide IRS PIN # here:			
19	Please provide a copy of Spouse's Driver's License or State-Issued ID.			
20	Does your spouse have an IRS Identity PIN for 2025 tax year?	YES	NO	N/A
	Provide IRS PIN # here:			

FILING STATUS

21	What is your tax filing status? Single, Head of Household, Married Filing Jointly, Married Filing Separate			
	[]			
22	Can you or your spouse be claimed as a dependent by another taxpayer?	YES	NO	N/A
	Please provide name and relationship.			

WAGES & INCOME

23	Did you receive W-2 income in 2025?	YES	NO	N/A
	Please provide ALL W-2s for 2025.			
24	Were you or spouse an employee who worked OVERTIME and/or received REPORTED TIPS in 2025?	YES	NO	N/A
	Due to the OBBBA passed in July 2025, please provide your LAST paystub for EACH job with overtime and/or Reported Tips you had during 2025.			
25	Are you self-employed and received a 1099-NEC?	YES	NO	N/A
	Please provide ALL 1099-NECs.			
26	Did you win gambling income?	YES	NO	N/A
	Please provide the W-2G for gambling winnings.			
27	Did you receive unemployment benefits or a state tax refund in 2025?	YES	NO	N/A
	Provide the 1099-G for your unemployment compensation, state tax refunds.			
28	Did you earn interest income from a bank account, CD, or other interest-bearing accounts?	YES	NO	N/A
	Please provide the 1099-INT for your interest income.			
29	Did you receive dividends or distributions from stocks, mutual funds, or other investments?	YES	NO	N/A
	Please provide the 1099-DIV for your dividends and distributions.			
30	Did you buy or sell stocks, mutual funds, bonds, or other investments?	YES	NO	N/A
	Please provide the 1099-B or brokerage statement for stocks, bonds, mutual funds, or other securities bought or sold through a broker or investment firm.			
31	Do you own a business that received OVER \$20,000 in credit card payments in 2025?	YES	NO	N/A
	Please provide Form 1099-K.			

Please answer ALL questions provide necessary documents.

DEPENDENTS

ALL dependents MUST HAVE lived with you for at least 6 months in 2025

Proof of Address MUST BE submitted for EACH dependent

32	Do you have dependents to claim?	YES	NO	N/A						
<table border="1" style="width: 100%;"> <tr> <td style="width: 50%;">Dependent #1 Legal Name</td> <td style="width: 5%;"> </td> <td style="width: 45%;">Dependent #2 Legal Name</td> </tr> <tr> <td><input style="width: 95%;" type="text"/></td> <td></td> <td><input style="width: 95%;" type="text"/></td> </tr> </table>		Dependent #1 Legal Name		Dependent #2 Legal Name	<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>			
Dependent #1 Legal Name		Dependent #2 Legal Name								
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>								
<table border="1" style="width: 100%;"> <tr> <td style="width: 50%;">Dependent #1 Social Security Number</td> <td style="width: 5%;"> </td> <td style="width: 45%;">Dependent #2 Social Security Number</td> </tr> <tr> <td><input style="width: 95%;" type="text"/></td> <td></td> <td><input style="width: 95%;" type="text"/></td> </tr> </table>		Dependent #1 Social Security Number		Dependent #2 Social Security Number	<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>			
Dependent #1 Social Security Number		Dependent #2 Social Security Number								
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>								
<table border="1" style="width: 100%;"> <tr> <td style="width: 50%;">Dependent #1 Date of Birth</td> <td style="width: 5%;"> </td> <td style="width: 45%;">Dependent #2 Date of Birth</td> </tr> <tr> <td><input style="width: 95%;" type="text"/></td> <td></td> <td><input style="width: 95%;" type="text"/></td> </tr> </table>		Dependent #1 Date of Birth		Dependent #2 Date of Birth	<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>			
Dependent #1 Date of Birth		Dependent #2 Date of Birth								
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>								
<table border="1" style="width: 100%;"> <tr> <td style="width: 50%;">Dependent #1 Daughter or Son Or Other?</td> <td style="width: 5%;"> </td> <td style="width: 45%;">Dependent #2 Daughter or Son or Other?</td> </tr> <tr> <td><input style="width: 95%;" type="text"/></td> <td></td> <td><input style="width: 95%;" type="text"/></td> </tr> </table>		Dependent #1 Daughter or Son Or Other?		Dependent #2 Daughter or Son or Other?	<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>			
Dependent #1 Daughter or Son Or Other?		Dependent #2 Daughter or Son or Other?								
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>								
<table border="1" style="width: 100%;"> <tr> <td style="width: 50%;">Dependent #3 Legal Name</td> <td style="width: 5%;"> </td> <td style="width: 45%;">Dependent #4 Legal Name</td> </tr> <tr> <td><input style="width: 95%;" type="text"/></td> <td></td> <td><input style="width: 95%;" type="text"/></td> </tr> </table>		Dependent #3 Legal Name		Dependent #4 Legal Name	<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>			
Dependent #3 Legal Name		Dependent #4 Legal Name								
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>								
<table border="1" style="width: 100%;"> <tr> <td style="width: 50%;">Dependent #3 Social Security Number</td> <td style="width: 5%;"> </td> <td style="width: 45%;">Dependent #4 Social Security Number</td> </tr> <tr> <td><input style="width: 95%;" type="text"/></td> <td></td> <td><input style="width: 95%;" type="text"/></td> </tr> </table>		Dependent #3 Social Security Number		Dependent #4 Social Security Number	<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>			
Dependent #3 Social Security Number		Dependent #4 Social Security Number								
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>								
<table border="1" style="width: 100%;"> <tr> <td style="width: 50%;">Dependent #3 Date of Birth</td> <td style="width: 5%;"> </td> <td style="width: 45%;">Dependent #4 Date of Birth</td> </tr> <tr> <td><input style="width: 95%;" type="text"/></td> <td></td> <td><input style="width: 95%;" type="text"/></td> </tr> </table>		Dependent #3 Date of Birth		Dependent #4 Date of Birth	<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>			
Dependent #3 Date of Birth		Dependent #4 Date of Birth								
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>								
<table border="1" style="width: 100%;"> <tr> <td style="width: 50%;">Dependent #3 Daughter or Son Or Other?</td> <td style="width: 5%;"> </td> <td style="width: 45%;">Dependent #4 Daughter or Son or Other?</td> </tr> <tr> <td><input style="width: 95%;" type="text"/></td> <td></td> <td><input style="width: 95%;" type="text"/></td> </tr> </table>		Dependent #3 Daughter or Son Or Other?		Dependent #4 Daughter or Son or Other?	<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>			
Dependent #3 Daughter or Son Or Other?		Dependent #4 Daughter or Son or Other?								
<input style="width: 95%;" type="text"/>		<input style="width: 95%;" type="text"/>								

33	Are any of your dependents required to file a tax return?	YES	NO	N/A
Please have your dependent contact our office for further details.				
34	Did you have any child care/daycare expenses?	YES	NO	N/A
Please provide supporting documents for your daycare expenses.				
35	Do you have any children with unearned interest or investment income over \$2,700?	YES	NO	N/A
Please provide dependent's 1099-1NT(s) forms.				
36	Do any of your dependents have EARNED income over \$5200?	YES	NO	N/A
Please provide dependents W-2(s) and/or 1099-NEC(s).				

INVESTMENTS

37	Do you have ownership in any partnership or S-Corporation for which we do NOT prepare the tax return?	YES	NO	N/A
Please provide Form K-1 and Basis statement for each business.				
38	Did you or your spouse start or purchase a business?	YES	NO	N/A
New business name and description:				
Provide summary of income and expenses by category (P&L or Income Statement)				
Please provide ALL formation documents.				

Please answer ALL questions provide necessary documents.

39	Do you own rental or royalty property?	YES	NO	N/A
	Please provide Form 1099-MISC or other document showing rental/royalty income.			
	Please provide detail of rental/royalty expenses.			
40	Do you own a farm or receive income from leasing farm property?	YES	NO	N/A
	Provide a summary of income and expenses by category (P&L or Income Statement)			
41	Did you sell an existing business, rental property, real estate, or farm?	YES	NO	N/A
	Please provide the HUD statement.			
42	Did you purchase or exchange (1031) any real estate?	YES	NO	N/A
	Please provide HUD statement.			
43	Did you inherit any property in 2025?	YES	NO	N/A
	Provide additional details here:			
44	Do you own any digital assets?	YES	NO	N/A
	Did you buy or sell any cryptocurrency or digital assets last year?	YES	NO	N/A
	Please provide supporting documentation for these cryptocurrency transactions.			

RETIREMENT

45	Did you receive Social Security benefits or disability payments from the Social Security Administration during the past year?	YES	NO	N/A
	Please provide the SSA-1099 for Social Security benefits received.			
46	Did you receive Railroad Retirement benefits during the past year?	YES	NO	N/A
	Please provide the RRB-1099 for Railroad benefits received.			
47	Did you inherit a retirement account in 2025?	YES	NO	N/A
	Provide further details here:			
48	Did you make a contribution to a retirement plan (401(k), IRA, Roth, SEP, etc.)?	YES	NO	N/A
	Please provide any forms 5498 for retirement account contributions.			
49	Did you contribute to an ABLER account?	YES	NO	N/A
	Please provide the 5498-QA for your contribution.			
50	Did you receive a distribution from a retirement plan (401(k), IRA, etc.)?	YES	NO	N/A
	Please provide any forms 1099-R for retirement distributions.			
51	Did you make a qualified charitable distribution directly from an IRA?	YES	NO	N/A
	Please provide Form 1099-R.			
52	Did you withdraw any amounts from an IRA to pay for medical expenses, purchase a principal residence, or other exempt distributions?	YES	NO	N/A
	Please provide Form 1099-R.			
53	Did you convert an existing IRA into a ROTH IRA?	YES	NO	N/A
	Please provide Form 1099-R.			
54	Did you transfer or rollover any amount from one retirement plan to another?	YES	NO	N/A
	Please provide Form 1099-R.			

Please answer ALL questions provide necessary documents.

55	Did you turn age 73 and have money in an IRA or other retirement account without taking any distributions?	YES	NO	N/A
----	--	-----	----	-----

HEALTHCARE

56	Did you have healthcare coverage through the Marketplace?	YES	NO	N/A
	Please provide Form 1095-A.			
57	Did you contribute to an HSA, Archer MSA, or Medicare Advantage MSA?	YES	NO	N/A
	Provide Form 5498-SA for your contribution and/or end-of-year account statement.			
58	Did you receive any distributions from a HSA account in 2025?	YES	NO	N/A
	Please provide Form 1099-SA.			
59	If you are self-employed, do you have health insurance?	YES	NO	N/A
	Provide total dollar amount of premiums paid in 2025: \$ _____			
	Are you eligible to be covered under an employer's health plan at another job?	YES	NO	N/A
60	If you received advanced premium tax credit, are married, and are filing separately from your spouse, are you a victim of domestic abuse or spousal abandonment?	YES	NO	N/A

EDUCATION

61	Did you or a dependent pay tuition and fees for higher education during the past year?	YES	NO	N/A
	Please provide the 1098-T from each institution.			
	How much money was spent out of pocket for books and supplies? \$ _____			
62	Is the student a candidate for a degree?	YES	NO	N/A
63	Did you pay interest on a qualified student loan during the past year?	YES	NO	N/A
	Please provide the 1098-E from each loan provider.			
64	Did you withdraw funds from a 529 college savings plan or other qualified education program during the past year?	YES	NO	N/A
	Please provide the 1099-Q for your distribution.			
65	Have you claimed the American Opportunity Tax Credit for higher education expenses?	YES	NO	N/A
	For who?			
	How many years was the credit claimed?			
	If claiming the AOTC for 2025, does the student have a 2025 felony conviction for possession or distribution of a controlled substance?			

PERSONAL RESIDENCE

66	Did you pay mortgage interest on a home loan during the past year?	YES	NO	N/A
	Please provide the 1098 statement for mortgage interest.			
67	Did you pay property taxes in 2025?	YES	NO	N/A
	Please provide a copy of a receipt as proof of payment.			
68	Did you purchase or sell your primary home in 2025?	YES	NO	N/A
	Please provide the HUD statement.			

Please answer ALL questions provide necessary documents.

69	Did you claim a homebuyer credit for a home purchased in 2008?	YES	NO	N/A
	Please provide remaining balance of repayment.			

CREDITS & DEDUCTIONS

70	Did you purchase an alternative energy or electric vehicle prior to October 1, 2025?	YES	NO	N/A
	Please list the year, make, model, and purchase price:			
	Please provide the invoice or receipt for this purchase.			

71	Did you purchase a NEW motor vehicle for PERSONAL USE ONLY in 2025?	YES	NO	N/A
	Please provide a copy of the sales contract AND qualifying interest paid to your finance company in 2025.			

72	Did you make any residential energy-efficient improvements or purchases involving solar, wind, geothermal or fuel cell energy sources?	YES	NO	N/A
	Please describe and list the cost:			
	Please provide any receipts or supporting documents for these improvements.			

73	Did you pay any expenses related to the adoption of a child during the year?	YES	NO	N/A
	Please provide total adoption related expenses.			
	Please provide any receipts or other documentation you might have for all adoption-related expenses paid.			

74	Did you reside in or operate a business in a Federally declared disaster area? The Federally declared disaster areas include victims of hurricanes, tropical storms, floods, as well as wildfires and other disaster situations.	YES	NO	N/A
	Describe the impact of the disaster to your residence and/or business:			

75	Did you (or your spouse) pay alimony?	YES	NO	N/A
	Alimony recipient name and amount paid:			
	Provide supporting documents for any alimony paid.			

MISCELLANEOUS

76	Did you receive alimony payments from a divorce agreement finalized before 2019?	YES	NO	N/A
	Please provide the statement of alimony received.			

77	Did you give gifts to any one person of \$19,000+ last year?	YES	NO	N/A
	Please provide gift details (recipient, amount, description):			

78	Did you receive income from jury duty, prizes, or awards during the past year?	YES	NO	N/A
	Please provide any statements or documentation.			

79	Did you receive long-term care benefits or accelerated death benefits?	YES	NO	N/A
	Please provide the 1099-LTC for benefits received.			

80	Did you have any debts forgiven or canceled during the year?	YES	NO	N/A
	Please provide Form 1099-C.			

2025 TAX ORGANIZER - Texas Tax Angels

Please answer ALL questions provide necessary documents.

81	Did you have any foreign financial accounts whose combined value exceeded \$10,000 at any point during the year?	YES	NO	N/A
Please provide the maximum account value and the currency on this account:				
Please list the name and address of the institution:				
82	Did you own any foreign property whose value exceeded \$200,000 at any point during the year?	YES	NO	N/A
Please provide foreign property details (description, value, etc.):				
83	Do you have a filing requirement for another state?	YES	NO	N/A
Please provide further details here:				
Please provide any State Income Only forms.				
84	Did you make any 2025 Estimated Tax payments to the IRS?	YES	NO	N/A
Please provide dates and amounts paid:				
85	If you have an overpayment of 2025 taxes, do you want the excess refunded or applied to your 2026 estimated tax liability?	Refunded	Apply to 2026 Estimated Tax Liability	
86	May the IRS discuss your 2025 tax return with your tax preparer?	YES	NO	N/A
87	Please list any questions or other concerns you might have.			

BANK ACCOUNT

88	Name of Financial Institution			
89	Routing Transit Number			
90	Your Account Number			
91	Type of Account (checking, saving, etc.)			
92	If applicable, do you want to use the bank account above for direct deposit for your 2025 tax refund?	YES	NO	N/A

Please answer ALL questions provide necessary documents.

PREFERENCES

93	Upon completion, would you like to sign your tax forms IN PERSON? *We will contact you when your forms are ready for signature.*	YES	NO	N/A
----	---	-----	----	-----

94	Upon completion, would you like to sign your tax forms ELECTRONICALLY? *Must have Liscio client portal* *To abide by IRS regulations, KBA signatures are required* *\$5 Non-Refundable fee per KBA signature will be added to your invoice*	YES	NO	N/A
----	--	-----	----	-----

95	Upon completion, would you like a digital copy of your 2025 tax return at no additional cost? *Must have Liscio client portal - WE CANNOT SEND COPY VIA EMAIL*	YES	NO	N/A
----	---	-----	----	-----

96	Upon completion, would you like a paper copy of your 2025 tax return?	YES	NO	N/A
	How would you like to receive your 2025 PAPER COPY? Pickup when you come to sign IN-PERSON? *no additional cost* MAILED to you? *additional \$15 postage fee*	Pickup In Person	Mailed to Me	

Taxpayer Signature Date

Spouse Signature Date