

# The Tax Shoppe 2025 Tax Checklist for your Dependent\*

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TAXPAYER NAME: \_\_\_\_\_

\*To be used by anyone who is claimed as a dependent on someone else's return

AND is **FILING A RETURN**

SOCIAL SECURITY NUMBER: \_\_\_\_\_

Parents' Names: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_

DRIVER'S LICENSE #: \_\_\_\_\_ STATE \_\_\_\_\_

ISSUE DATE: \_\_\_\_\_ EXP DATE: \_\_\_\_\_ DOC # \_\_\_\_\_ (NY only)  
 (First 3 digits)

OCCUPATION: \_\_\_\_\_

EMAIL: \_\_\_\_\_

BEST TELEPHONE: \_\_\_\_\_ H C W

ADDRESS: \_\_\_\_\_ CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

**Is this a new address? Yes        No        If yes, Date of Move:       /       /**

**DIRECT DEPOSIT** Checking \_\_\_\_\_ Savings \_\_\_\_\_  
 If you owe, use this acct for taxes due with return filing Yes        No         
 (Payments can only be made using **Checking Account**)  
 Routing Number: \_\_\_\_\_  
 Account Number: \_\_\_\_\_  
**IRS only accepting Electronic payments for refunds & tax due!**

## RETURN HANDLING INSTRUCTIONS

Digital copy EMAIL (\$5 add'l charge)	Digital copy CD (\$5 add'l charge)	Email only No charge
Send to address other than parent? Y <u>      </u> N <u>      </u> Specify: _____		

**Please note that any form of payment is due prior to e-filing of return.**

<b>Prep Payment Info</b>	<b>DIRECT DEBIT FROM CHECKING ACCOUNT (Acct info required)</b>				
	Bank Routing # (First 9 digits on your check)	Checking Account Number	X	Sign here for cc or direct debit authorization	
<b>CREDIT CARD</b> MC/Visa/AMEX/Discover	Credit Card Number	Expiration Date (mm/yy)		CCID on back of card	
I prefer to pay by cash / check /money order.					

Please include all income documents. Fill out below if you received 1099-NEC or 1099-Misc.

**Self-Employment Income:** \$ \_\_\_\_\_ **Expenses recorded properly?** Yes        No        **Mileage Log?** Yes        No        Bz miles \_\_\_\_\_  
**Occupation:**  
 Auto/Truck Expenses (Incl. yr/make/model/weight – leased or owned - mileage – actual expenses – purchase date/price) \_\_\_\_\_  
 Tolls and Parking \_\_\_\_\_  Cost of Goods Sold \_\_\_\_\_  Advertising & Insurance & Health Insurance \_\_\_\_\_  
 Fees/Licenses/Permits \_\_\_\_\_  Office Expenses & Supplies \_\_\_\_\_  Payroll/Subcontractors (provide W-2's & 1099's) \_\_\_\_\_  
 Telephone & Utilities \_\_\_\_\_  Dues & Professional Publications \_\_\_\_\_  Postage/Freight/Delivery/Printing \_\_\_\_\_  
 Computer Expenses \_\_\_\_\_  Internet Expenses \_\_\_\_\_  Miscellaneous \_\_\_\_\_ (List separately)

**COMMENTS:** (Attach additional sheets if needed)

I authorize THE TAX SHOPPE to prepare my 2025 tax return and create my PIN number for Form 8879 to be used as my signature for electronic filing. The information I/we have provided is COMPLETE.

Signature Taxpayer or Guardian : \_\_\_\_\_ Date: \_\_\_\_\_