

# 2025 Individual Tax Return Intake Form

Date: \_\_\_\_\_

**COMPLETE THIS ENTIRE FIRST PAGE EVEN IF YOU ARE A RETURNING CLIENT**

**New clients: Two forms of identification are required to file your return.**

**PRIMARY TAXPAYER**

LAST NAME \_\_\_\_\_ FIRST NAME \_\_\_\_\_

JOB TITLE \_\_\_\_\_

Cell Telephone #: \_\_\_\_\_ Work Telephone #: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Social Security #: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

**SPOUSE INFORMATION**

LAST NAME \_\_\_\_\_ FIRST NAME \_\_\_\_\_

JOB TITLE \_\_\_\_\_

Cell Telephone #: \_\_\_\_\_ Work Telephone #: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Social Security #: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

**MAILING ADDRESS:**

Street \_\_\_\_\_

Add'l (Apt, Lot, Etc.) \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Yes	No	QUESTION
<input type="checkbox"/>	<input type="checkbox"/>	Do you require any state/city returns other than Oklahoma? If yes, list: _____
<input type="checkbox"/>	<input type="checkbox"/>	Did your telephone number or email address change during the year?
<input type="checkbox"/>	<input type="checkbox"/>	Did your address change during the year?
<input type="checkbox"/>	<input type="checkbox"/>	Did your marital status change during the year?
As of December 31, 2025, what was your <b>legal</b> marital status?		<input type="checkbox"/> Single (includes Divorced and Widowed) <input type="checkbox"/> Married
<b>Choose the filing status for your 2025 return.</b> <input type="checkbox"/> Single <input type="checkbox"/> Head of Household <input type="checkbox"/> Qualifying Surviving Spouse <input type="checkbox"/> Married Filing Jointly (MFJ) <input type="checkbox"/> Married Filing Separately (MFS)		
How would you prefer to receive your completed tax return? <b>Please select only one.</b>		<input type="checkbox"/> Secure Portal Link through Liscio ( <i>default method</i> ) <input type="checkbox"/> Encrypted Email <input type="checkbox"/> Paper Copy

Provide the information for the bank account you wish any refund deposited by either writing the information below or attaching a voided check. **If the account has not changed from last year, you may simply write 'Same as last year'.**

Routing	Account	Checking or Savings Account?

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## GOVERNMENT SUBSIDIES FOR HEALTH INSURANCE

Yes	No	QUESTION
<input type="checkbox"/>	<input type="checkbox"/>	Did the state or federal government subsidize or help pay the monthly premium for you, your spouse or any dependent? (e.g. Marketplace, Obamacare, etc.)? <b>FORM 1095A Required</b>

## HOUSEHOLD STATUS

Yes	No	QUESTION
<input type="checkbox"/>	<input type="checkbox"/>	Can you or your spouse be claimed as a dependent by someone else?
<input type="checkbox"/>	<input type="checkbox"/>	Are you, your spouse, or any of your dependents a <b>nonresident alien</b> ?
<input type="checkbox"/>	<input type="checkbox"/>	Are you, your spouse, or any of your dependents permanently and totally disabled?
<input type="checkbox"/>	<input type="checkbox"/>	Are you or your spouse active military?

## DEPENDENT CHANGES IN 2025

Yes	No	QUESTION
<input type="checkbox"/>	<input type="checkbox"/>	Did the quantity or identities of your dependents change in 2025?
<input type="checkbox"/>	<input type="checkbox"/>	Did any of your dependents become 18 in 2025?
<input type="checkbox"/>	<input type="checkbox"/>	Did you give birth or adopt a child in 2025?

**Dependent Information** Provide documentation for proof of dependency for earned income credit (school records, medical records, daycare records, etc.)

#	Last Name	First Name	Date of Birth	Social Security Number	Relationship (Child, Stepchild, Parent, etc.)	Can Anyone Else Claim This Person? Y/N
1						
2						
3						
4						

## PARENTAL CHOICE TAX CREDITS

Yes	No	QUESTION	FORM NEEDED
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive any Parental Choice Tax Credits in 2025 to help pay for home-schooling or private schools? (The credit is paid directly to the school.)	<b>1099-G</b>

## TAX RETURN ESTIMATED PAYMENTS AND REFUNDS

Yes	No	QUESTION
<input type="checkbox"/>	<input type="checkbox"/>	Did you make any estimated payments toward your 2025 taxes?
<input type="checkbox"/>	<input type="checkbox"/>	Did you receive a refund from any state last year?
<input type="checkbox"/>	<input type="checkbox"/>	Did you itemize on your tax return last year?

## DIGITAL ASSET AKA CRYPTOCURRENCY

A digital asset is a digital representation of value which is recorded on a cryptographically secured, distributed ledger. Common digital assets include: Convertible virtual currency and cryptocurrency, Stablecoins, Non-fungible tokens (NFTs)

TAXPAYER		SPOUSE		QUESTION
Yes	No	Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you (a) receive (as a reward, award or payment for property or services); or (b) sell, exchange, gift or otherwise dispose of a digital asset (or a financial interest in a digital asset) during the year?
Check the "Yes" box if you: <ul style="list-style-type: none"> <li>• Received digital assets as payment for property or services provided;</li> <li>• Transferred digital assets for free (without receiving any consideration) as a bona fide gift;</li> <li>• Received digital assets resulting from a reward or award;</li> <li>• Received new digital assets resulting from mining, staking and similar activities;</li> <li>• Received digital assets resulting from a hard fork (a branching of a cryptocurrency's blockchain that splits a single cryptocurrency into two);</li> <li>• Disposed of digital assets in exchange for property or services;</li> <li>• Disposed of a digital asset in exchange or trade for another digital asset;</li> <li>• Sold a digital asset; or</li> <li>• Otherwise disposed of any other financial interest in a digital asset.</li> </ul>				

## EMPLOYMENT INCOME

TAXPAYER		SPOUSE		QUESTION	FORM NEEDED
Yes	No	Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Were you employed as an employee?	<b>W-2</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you report any tip income to your employer?	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Were you paid any overtime pay during the year?	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you have any tip income <b>NOT</b> reported to your employer?	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Were you employed as contract labor?	<b>1099-NEC</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive any unemployment benefits?	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you have any income not reported on W-2, 1099, or K-1?	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you work outside the state of Oklahoma in 2025?	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you work outside the United States in 2025?	

## RETIREMENT AND DISABILITY INCOME

TAXPAYER		SPOUSE		QUESTION	FORM NEEDED
Yes	No	Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive Social Security (disability or retirement)?	<b>SSA-1099</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive Railroad retirement?	<b>RRB-1099</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive any disability income other than Social Security?	<b>1099-R</b>

## 2025 Individual Tax Return Intake Form

### INVESTMENT INCOME

TAXPAYER		SPOUSE		QUESTION	FORM NEEDED
Yes	No	Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive a K-1 from any S Corp, LLC, Partnership, or C Corp?	<b>K-1</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have income from a trust or estate?	<b>K-1</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have income from a farm or rental property?	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Earn any dividends from stocks, bonds, or other investments, including reinvested dividends?	<b>1099-DIV</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Earn any interest from stocks, bonds, or other investments?	<b>1099-INT</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cash any U.S. Savings Bonds?	<b>1099-INT</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Buy or sell any stocks, bonds, or other investments?	<b>1099-B</b>

### GAMBLING AND OTHER INCOME

TAXPAYER		SPOUSE		QUESTION	FORM NEEDED
Yes	No	Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have any gambling winnings?	<b>W-2G</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive any government grants?	<b>1099-G</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive any monies from the Department of Agriculture?	<b>1099-G</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you have a side business?	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Trade or barter any products or services?	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sell any goods over the internet during the year?	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive payments through a third-party processors or credit card vendors?	<b>1099-K</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive any other income during the year?	

### DEBT FORGIVENESS AND BANKRUPTCY DURING THE YEAR

TAXPAYER		SPOUSE		QUESTION	FORM NEEDED
Yes	No	Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have any debts cancelled or forgiven this year? (This includes credit card balances.)	<b>1099-C</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Own any property that was subject to short sell or foreclosure?	<b>1099-C</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Claim bankruptcy during the year?	

### CONTRIBUTIONS DURING THE YEAR

TAXPAYER		SPOUSE		QUESTION	FORM NEEDED
Yes	No	Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Contributions to 401K?	<b>W-2</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Contributions to IRA, SEP, Roth IRA?	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Contributions to HSA, Archer MSA, Medicare Advantage MSA?	<b>8889</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Contributions to Education Savings Account or Qualified Tuition Program?	<b>5498-ESA</b>

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### DISTRIBUTIONS DURING THE YEAR

TAXPAYER		SPOUSE		QUESTION	FORM NEEDED
Yes	No	Yes	No		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive money from 401K, IRA, SEP, or Roth IRA?	<b>1099-R</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive money from HSA, Archer MSA, Medicare Advantage MSA?	<b>1099-R</b>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive money from Education Savings Account or Qualified Tuition Program?	<b>1099-R</b>

### EXPENSES DURING THE YEAR

Yes	No	QUESTION	FORM NEEDED
<input type="checkbox"/>	<input type="checkbox"/>	Pay tuition expenses required for college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)?	<b>1098-T</b>
<input type="checkbox"/>	<input type="checkbox"/>	Have any childcare expenses during the year?	
<input type="checkbox"/>	<input type="checkbox"/>	Have any adoption expenses during the year?	
<input type="checkbox"/>	<input type="checkbox"/>	Did you incur unreimbursed expenses caring for a family member who was 62 years old or older in 2025?	
<input type="checkbox"/>	<input type="checkbox"/>	Pay any alimony because of agreements dated before January 1, 2019?	
<input type="checkbox"/>	<input type="checkbox"/>	Pay any long-term healthcare premiums for you, your spouse, or a dependent during the year?	
<input type="checkbox"/>	<input type="checkbox"/>	Do your out-of-pocket medical or dental expenses (premiums, prescriptions, etc.) <b>paid</b> during the year exceed 7.5% of your adjusted gross income?	
<input type="checkbox"/>	<input type="checkbox"/>	Did you donate money to an IRS-recognized charity and receive nothing in return for your gift?	
<input type="checkbox"/>	<input type="checkbox"/>	Did you donate goods to an IRS-recognized charity and receive nothing in return for your gift?	
<input type="checkbox"/>	<input type="checkbox"/>	Did you have any medical mileage during the year? If yes, how many miles? _____	
<input type="checkbox"/>	<input type="checkbox"/>	Travel for charity during the year? If yes, how many miles? <b>CHARITY MILEAGE</b> _____	
<input type="checkbox"/>	<input type="checkbox"/>	Have gambling losses during the year?	<b>Provide Proof</b>
<input type="checkbox"/>	<input type="checkbox"/>	Pay wages to any household employees (babysitter, nanny, housekeeper, etc.)?	
<input type="checkbox"/>	<input type="checkbox"/>	Pay interest on a loan incurred in 2025 to purchase a <b>new</b> made-in-America vehicle for personal use? If yes, provide the year, make, model, VIN, and loan information.	<b>Provide vehicle and loan info</b>
<input type="checkbox"/>	<input type="checkbox"/>	Make any gifts to any one person more than \$19,000 during the year? If yes, are you splitting the gift with your spouse: _____	
<input type="checkbox"/>	<input type="checkbox"/>	Have worthless stocks or other investments?	

**HOMES AND REAL ESTATE**

Yes	No	QUESTION	FORM NEEDED
<input type="checkbox"/>	<input type="checkbox"/>	Pay any mortgage interest during the year?	<b>1098</b>
<input type="checkbox"/>	<input type="checkbox"/>	Refinance your principal home or second home or take out a home equity loan during the year? (If yes, provide all escrow, closing, and other pertinent documentation and information.)	<b>1098</b>
<input type="checkbox"/>	<input type="checkbox"/>	Sell, exchange, or purchase any real estate during the year? Check this box if it was your principal residence. <input type="checkbox"/>	<b>Closing Docs</b>
<input type="checkbox"/>	<input type="checkbox"/>	Pay any real estate property taxes or personal property taxes during the year?	
<input type="checkbox"/>	<input type="checkbox"/>	Foreclose or abandon a principal residence or real property during the year?	<b>1099-A</b>
<input type="checkbox"/>	<input type="checkbox"/>	Rent out your home or use it for business? (This includes temporary rental through AirBnB etc.)	
<input type="checkbox"/>	<input type="checkbox"/>	Own any property outside of Oklahoma?	

**FOREIGN FINANCIAL INTEREST AND AUTHORITY INFORMATION**

TAXPAYER		SPOUSE		QUESTION
Yes	No	Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Do you own any mutual funds either personally or through a business?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Do you own or have control over any bank accounts outside the United States?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Do you own any foreign stocks or bonds?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you have a financial interest in or signature authority over a financial account located in a foreign country?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you have any income from, or pay taxes to, a foreign country? <i>(Worldwide, including Canada and Mexico)</i>

**ENERGY EFFICIENT HOME IMPROVEMENT TAX CREDIT**

- This tax credit only applies to your primary residence which is in the US. The home cannot be a new home but rather a home you improve or add onto.
- Materials must be eligible for the credit. Check the Energy Star website

Yes	No	QUESTION	FORM NEEDED
<input type="checkbox"/>	<input type="checkbox"/>	Did you install exterior doors, windows, skylights, or insulation materials?	<b>RECEIPTS</b>
<input type="checkbox"/>	<input type="checkbox"/>	Did you install efficient air conditioners, heating equipment and/or water heating equipment?	<b>RECEIPTS</b>

**RESIDENTIAL CLEAN ENERGY CREDIT**

- This tax credit applies to improvement to your main home, whether you own or rent it. It applies to new or existing homes located in the United States.
- You may be able to claim a credit for certain improvements made to a second home in the US that you live in part-time and don't rent to others.

Yes	No	QUESTION	FORM NEEDED
<input type="checkbox"/>	<input type="checkbox"/>	Did you install any of the following? <ul style="list-style-type: none"> <li>• Solar electric panels</li> <li>• Solar water heaters</li> <li>• Wind turbines</li> </ul>	<ul style="list-style-type: none"> <li>• Geothermal heat pumps</li> <li>• Fuel cells</li> <li>• Battery storage technology</li> </ul>

**CLEAN VEHICLES AND ALTERNATIVE FUEL REFUELING PROPERTY CREDIT**

- Vehicle Refueling Property limited to low-income and non-urban areas.

Yes	No	QUESTION	FORM NEEDED
<input type="checkbox"/>	<input type="checkbox"/>	Did you purchase a new or used clean vehicle during the tax year? (A list of eligible vehicles can be found at FuelEconomy.gov. If yes, provide the year, make, model, VIN, and date the vehicle was placed in service.	Provide car info
<input type="checkbox"/>	<input type="checkbox"/>	Did you install an alternative fuel vehicle refueling and charging property, including home electric vehicle charging stations? Qualified fuels include electricity, ethanol, natural gas, hydrogen, and biodiesel.	RECEIPTS

**S-CORP, PARTNERSHIP, OR C-CORP INCOME**

TAXPAYER		SPOUSE		QUESTION
Yes	No	Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Are you a member/officer of any S Corp, Partnership or C Corp?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have the tax returns for each of these businesses been filed? <i>If the return was not processed by us, please provide a copy of the return as well as your K-1.</i>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Acquire a new or additional interest in a partnership or S corporation?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sell your interest in a partnership or S corporation?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Were any previous business returns amended due to ERC (Employee Retention Credit)?

**SOLE PROPRIETORSHIP OR SINGLE MEMBER LLC INCOME**

Yes	No	QUESTION
<input type="checkbox"/>	<input type="checkbox"/>	Start a new Single Member LLC or Sole Proprietorship during the year?
<input type="checkbox"/>	<input type="checkbox"/>	Sell an existing business, rental, or other property during the year?
<input type="checkbox"/>	<input type="checkbox"/>	Purchase any business assets or convert any assets to business use?
<input type="checkbox"/>	<input type="checkbox"/>	Issue any 1099s or W-2s for 2025? If yes, please provide copies.
<input type="checkbox"/>	<input type="checkbox"/>	Pay health insurance premiums for your employees during the year?
<input type="checkbox"/>	<input type="checkbox"/>	Purchase any gasoline, diesel, or special fuels for non-highway business use?
<input type="checkbox"/>	<input type="checkbox"/>	Receive any ERC (Employee Retention Credit) funds during the year?
<input type="checkbox"/>	<input type="checkbox"/>	Sell medical marijuana products?

**CASH APP USE FOR BUSINESS AND/OR SIDE BUSINESS**

TAXPAYER		SPOUSE		QUESTION
Yes	No	Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you receive any monies via cash app for services or products?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Did you pay any monies via cash app for business expenses?

I (We) acknowledge that you have reported all 2025 **worldwide** income you received including barter, crypto-currency, consumer-to-consumer activity, cash-based revenues and all other income whether received in-person, in-kind, or electronically. **US Citizens and Permanent Residents are required to report their worldwide income.**

Client Signature \_\_\_\_\_

Date: \_\_\_\_\_

Spouse Signature \_\_\_\_\_

Date: \_\_\_\_\_