



INCOME TAX INFORMATION FOR 2025

We appreciate the opportunity to serve you! Please take some time to complete the following and include with your supporting tax documents.

Husband's Name: _____

Date of Birth: ____ / ____ / ____ SS#: _____

Wife's Name: _____

Date of Birth: ____ / ____ / ____ SS#: _____

Address: _____

Husband's Phone: _____

Wife's Phone: _____

Husband's Email Address: _____ Wife's Email Address: _____

Primary contact: Husband () Wife ()

Preferred method of communication: Phone () Email ()

OCCUPATIONS

Husband: _____

Wife: _____

CHILDREN OR OTHER INDIVIDUALS TO BE CLAIMED AS DEPENDENTS

Name: _____ DOB: ____ / ____ / ____ SS#: _____ Relationship: Son / Daughter / Parent

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Name: _____ DOB: ____ / ____ / ____ SS#: _____ Relationship: Son / Daughter / Parent

Did the dependent(s) live with you for over half the year? Yes ____ No ____

GENERAL QUESTIONS

Were there any significant changes in your employment, such as a change in jobs, in 2025?

If yes, explain: _____

Yes ____ No ____

Did you have greater than \$10,000 in *foreign* bank accounts (combined) at any point in 2025?

If yes, explain: _____

Yes ____ No ____

Did you receive an Identity Protection Pin (IP Pin) letter in 2025? If yes, please provide.

Yes ____ No ____

Did you receive tips or overtime income in 2025? If yes, **see page 5** for additional information.

Yes ____ No ____

Did you receive Form 1095A, Health Insurance Marketplace Statement in 2025?

If yes, please provide.

Yes ____ No ____

BANK ACCOUNT INFORMATION

In the case of a tax refund:

Due to recent legislation, the IRS is now generally required to issue refunds electronically. It is possible to receive a paper refund check but electing to do so will significantly delay the processing of your refund. Therefore, to receive a timely refund, we highly recommend listing a bank account on your tax return. Please complete the information below.

If your bank account information is the same as last year, please confirm: Yes No

Name of Bank: _____

Type of Account: Checking () Savings ()

Routing Number: _____

Account Number: _____

In the case of a tax balance due:

Instead of mailing a check to the IRS, I would like to have my **tax balance due withdrawn electronically** from the above bank account. Yes No

DRIVER'S LICENSE INFORMATION **REQUIRED FOR STATE E-FILING**

To protect against identity theft, the Alabama Department of Revenue requires taxpayers to include their current driver's license information upon e-filing. Please complete the following information.

Name (Include both spouses if filing jointly)	Driver's License No. & State	Issue Date	Expiration Date

CLIENT COPY OF INCOME TAX RETURN

Please indicate below the format you wish to receive your completed tax return:

Electronic (PDF) () Preferred email address: _____

Paper ()

2025 QUARTERLY ESTIMATED TAX PAYMENTS

	FEDERAL	STATE
1 st quarter (Due April 15, 2025)	\$ _____	\$ _____
2 nd quarter (Due June 16, 2025)	\$ _____	\$ _____
3 rd quarter (Due September 15, 2025)	\$ _____	\$ _____
4 th quarter (Due January 15, 2026)	\$ _____	\$ _____
TOTAL	\$ _____	\$ _____

VIRTUAL CURRENCY / DIGITAL ASSET

At any time during 2025, did you receive (as a reward, award, or payment for property or services), or sell, exchange, or otherwise dispose of a digital asset or a financial interest in a digital asset? Yes No

If yes, please provide Form 1099-DA.

SALARY: Please Provide all W-2s**PENSION/IRA/ANNUITY DISTRIBUTION: Please provide all Form 1099-Rs.****INTEREST & DIVIDENDS: Please provide all Form 1099s****OTHER INCOME**

Social Security: Husband: \$ _____ Wife: \$ _____ (Please provide Form SSA-1099)

Unemployment: Husband: \$ _____ Wife: \$ _____

Alimony Received: \$ _____ Alimony Paid: \$ _____

*(Do not include child support payments)

INDIVIDUAL RETIREMENT ACCOUNT (IRA) CONTRIBUTIONS

Indicate below how much you have contributed for the current tax year or will contribute before the filing date of your tax return.

AMOUNTHusband: \$ _____ Traditional () Roth ()Spouse: \$ _____ Traditional () Roth ()**PURCHASE OR SALE OF RESIDENCE**Did you buy or sell a residence during the year? Buy () Sell ()

Did you own and live in the residence for two of the five years prior to the sale? Yes _____ No _____

**Please provide copies of HUD-1 closing statements for both the purchase of your new residence as well as the sale of your prior residence.

For the prior residence that was sold in 2025 (if the HUD-1 closing statement is not available):Purchase date of the prior residence (*approximate if unknown*): \$ _____Purchase price of the prior residence (*approximate if unknown*): \$ _____**OTHER SALES - Please provide all Form 1099s**

Did you buy or sell any stocks, bonds, land or timber? If so, provide copies of all sales and purchase information, including 1099s. Please give any additional details below.

<u>DESCRIPTION</u>	DATE <u>PURCHASED</u> <i>(Approx. if unknown)</i>	PURCHASE <u>PRICE</u> <i>(Approx. if unknown)</i>	DATE <u>SOLD</u>	SELLING <u>PRICE</u>
1. _____	____ / ____ / ____	\$ _____	____ / ____ / ____	\$ _____
2. _____	____ / ____ / ____	\$ _____	____ / ____ / ____	\$ _____
3. _____	____ / ____ / ____	\$ _____	____ / ____ / ____	\$ _____

BUSINESS ACTIVITY (Sole Proprietor, LLC, etc.)

Business Name/Type: _____ Tax ID#(EIN)(if applicable): _____

Business Bank Account Balance at 12/31/25: \$ _____
(Only if the account is in the name of the business)Business Income: \$ _____ (Please provide all Form 1099s)**Business Expenses:**

Advertising: \$ _____	Office Expenses: \$ _____	Meals: \$ _____
Commissions: \$ _____	Rent: \$ _____	Utilities: \$ _____
Insurance: \$ _____	Repairs/Maint.: \$ _____	Equipment: \$ _____
Mortgage Interest: \$ _____	Supplies: \$ _____	Other: \$ _____
Other Interest: \$ _____	Taxes/Licenses: \$ _____	Other: \$ _____
Legal & Prof. Fees: \$ _____	Travel: \$ _____	Other: \$ _____

Business Mileage:

TOTAL 2025 car mileage: _____

Business mileage portion: _____

***Please remember to keep detailed records (a mileage log) of business mileage that includes each trip's business purpose, date, destination, odometer readings, and distance. There are several apps designed for this purpose that can help you meet the IRS's standard of record keeping for this deduction.*

RENTAL / ROYALTY ACTIVITY

Property Address: _____ Residential Property () Commercial Property ()

Tax ID#(EIN)(if applicable): _____

Rental/Royalty Income: \$ _____ (Please provide all Form 1099s)**Rental/Royalty Expenses:**

Advertising: \$ _____	Cleaning/Maint.: \$ _____	Other: \$ _____
Commissions: \$ _____	Repairs: \$ _____	Other: \$ _____
Insurance: \$ _____	Supplies: \$ _____	Other: \$ _____
Mortgage Interest: \$ _____	Taxes: \$ _____	Other: \$ _____
Pest Control: \$ _____	Utilities: \$ _____	Other: \$ _____
Legal & Prof. Fees: \$ _____	Management Fees: \$ _____	Other: \$ _____

ALABAMA CONSUMER USE TAX

When you shop at retail stores and many other business establishments in Alabama, the price you pay for the retail purchases you make usually includes Alabama sales taxes. This tax is calculated at the rate of 4% of the cost of the item(s) you purchased. When you make retail purchases for similar items from businesses located outside of Alabama (mail order, internet, telephone, while on vacation, etc.), you are responsible, as the consumer, for ensuring that the Alabama sales tax (which is called a "consumer use tax") is paid on these purchases if the business from which you made your purchase did not charge you Alabama sales tax for your purchase(s) and if the items you purchased are delivered to or brought back with you to Alabama.

If you were charged a sales tax (other than Alabama sales tax) by the out-of-state business for the item(s) you purchased, you are allowed a credit against your Alabama consumer use tax due for the amount of the sales tax you paid with your purchase, not to exceed 4% of the purchase price.

Did you purchase any goods during the year for which you would be responsible for paying Alabama Sales Tax?

Yes: _____ No: _____

If "Yes", include a list of items purchased along with the purchase price.

MEDICAL AND DENTAL EXPENSES

(Expenses not paid by insurance)

Drugs	\$ _____
Medical Insurance	\$ _____
(Premiums not paid by employer)	
Long Term Care Ins.	\$ _____
Doctors	\$ _____
Dentists	\$ _____
Hospital Costs	\$ _____
Glasses	\$ _____
Other:	\$ _____
	\$ _____
	\$ _____
	\$ _____
	\$ _____

Travel – Mileage
(to/from doctors) _____**TAXES**

Property Tax	\$ _____
Auto Taxes/Ad Valorem	\$ _____
Other Taxes:	\$ _____

INTEREST EXPENSE**HOME MORTGAGE LOANS and/or
HOME EQUITY LOANS:**

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

CONTRIBUTIONS*Monetary Contributions/Donations:*

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Non-monetary Contributions/Donations:

_____	\$ _____
_____	\$ _____

NEW FOR 2025**“No Tax on Car Loan Interest”**

Applicable for new vehicle loans originated after 12/31/24

Loan Origination Date: _____

Total Interest Paid in 2025: \$ _____

Required Vehicle Information:

VIN #: _____

Make, Model, Year: _____

“No Tax on Tips”

Occupation: _____

Tip Income Included on W-2 or Form 1099: \$ _____

“No Tax on Overtime”

Overtime Income Included on W-2 or Form 1099:

\$ _____

*Please provide your last paystub for 2025 showing the year-to-date totals of overtime compensation.

UNREIMBURSED W-2 EMPLOYEE EXPENSES

1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____

Unreimbursed W-2 Employee Mileage:

Total 2025 Mileage: _____

Job Related Portion: _____

OTHER

Union Dues	\$ _____
Professional Dues	\$ _____
Uniforms	\$ _____
Tools/ Safety Equipment	\$ _____
Tax Preparation Fee	\$ _____
Safe Deposit Box	\$ _____
Other:	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

EDUCATION RELATED INFORMATION**Form 1098-T (Education expenses):**

Member Attending School: _____

Full Time Student: () Yes () No

Year: Freshman () Soph. () Junior () Senior ()

School or College: _____

Additional education expenses not listed on 1098-T:

Fees: \$ _____

Books: \$ _____

529 Plans (Federal Qualified Tuition Program) (Please provide statement):

Plan Name: _____

2025 Contributions: \$ _____

2025 Distributions: \$ _____

Form 1099-O (Distributions received):

Member Attending School: _____

Full Time Student: () Yes () No

Year: Freshman () Soph. () Junior () Senior ()

School or College: _____

Distributions received were used for:

Tuition/Fees: \$ _____

Books: \$ _____

Housing: \$ _____

CHILD CARE EXPENSES (Child Care Credit)

Child's Name: _____ Amount: \$ _____

Day Care/School: _____ Address of School: _____

Tax I/D#(EIN) of Day Care/School: _____

*(Required to qualify for credit)

Child's Name: _____ Amount: \$ _____

Day Care/School: _____ Address of School: _____

Tax I/D#(EIN) of Day Care/School: _____

*(Required to qualify for credit)

CLIENT SIGNATURE AND LETTER OF UNDERSTANDING

All information provided in the accompanying income tax worksheet is correct and complete to the best of my (our) knowledge. We understand your firm will prepare the returns based upon the information for which I (we) have provided to you. I (we) understand that some credits or deductions are often eliminated or reduced if my income exceeds certain levels. This may include education credits, student loan interest, retirement deductions, contributions and medical expenses.

I (we) understand that if additional information is provided after my (our) income tax returns are completed, there will be an additional charge for the time required to change the returns.

Signature: _____

Date: _____

Signature: _____

Date: _____

THANK YOU FOR ALLOWING OUR FIRM TO SERVE YOU IN THIS CAPACITY!



Dear Client:

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide.

We will prepare your 2025 federal income tax return, and the mutually agreed-upon state income tax returns. This engagement pertains only to the 2025 tax year, and our responsibilities do not include preparation of any other tax returns that may be due to any taxing authority. Our engagement will be complete upon the delivery of the completed returns to you.

Professional standards now require us to electronically file all federal and state individual income tax returns. Please note that although e-filing will require both you and our firm to complete additional steps, the same filing deadlines will apply. You must therefore ensure that you complete the additional requirements well before the due dates in order for our firm to be able to timely transmit your return. Our firm must transmit your return to the taxing authorities (rather than you). Current regulations require that our firm obtain written authorization from you prior to e-filing your returns. We will provide Forms 8879 (Federal) and AL8453 (State of Alabama), which serve the purpose of written authorization. These forms will be provided to you when you pick up your copy of the return (in person or electronically) and must be signed (in person or electronically) and returned to our Firm prior to e-filing. Should your return be rejected for any reason by the taxing authorities, we will contact you immediately to discuss the reasons for its rejections and how it can be corrected. We will also provide you with another copy of your return which reflects these changes.

Your returns may be selected for review by one or more than one taxing authority. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon your written request to represent you during the examination and/or during any appeal. Any such representation will be the subject of, and governed by, a separate engagement letter.

We will prepare the returns from information which you will furnish to us. It is your responsibility to provide all the information required for the preparation of complete and accurate returns. We will furnish you a tax information worksheet to guide you in gathering the necessary information. Your use of such forms will assist us in keeping our fee to a minimum. To the extent we render any accounting and/or bookkeeping assistance, it will be limited to those tasks we deem necessary for preparation of the returns.

The timeliness of your cooperation is essential to our ability to complete this engagement. Specifically, we must receive sufficient information from which to prepare your returns within a reasonable period of time prior to the applicable filing deadline. Accordingly, if we do not receive information from you, as noted above, by March 20, 2026, it may be necessary for us to pursue an extension of the due date of your returns, and we reserve the right to suspend our services or withdraw from this engagement. An extension to file your tax return does not extend the due date for payment of any tax liability owed beyond April 15, 2026. Payment of your tax liability after this date may result in interest and penalties.

We will not audit or otherwise verify the data you submit. Accordingly, our engagement cannot be relied upon to disclose errors, fraud, or other illegal acts that may exist. However, it may be necessary to ask you for clarification of some of the

information you provide, and we will inform you of any material errors, fraud, or other illegal acts that come to our attention.

You are responsible for maintaining an adequate and efficient accounting system, for safeguarding assets, for authorizing transactions, and for retaining supporting documentation for those transactions, all of which will, among other things, help assure the preparation of proper returns. Furthermore, you are responsible for evaluating the adequacy and results of the services we provide.

The law provides various penalties and interest that may be imposed when taxpayers underestimate their tax liability. You acknowledge that any such understated tax, and any imposed interest and penalties, are your responsibility, and that we have no responsibility in that regard. If you would like information on the amount or circumstances of these penalties, please contact us.

We may encounter instances where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. In those instances, we will outline for you each of the reasonable alternative courses of action, including the risks and consequences of each such alternative. In the end, we will adopt, on your behalf, the alternative which you select after having considered the information provided by us.

Without disclosure in the return itself of the specific position taken on a given issue, we must have a reasonable belief that the position(s) satisfies the substantial-authority standard and that the position will be held to be the correct position upon examination by taxing authorities. If we do not have that reasonable belief, we must be satisfied that there is at least a reasonable basis for the position, and in such a case, the position must be formally disclosed on Form 8275 or 8275-R, which would be filed as part of the return. If we do not believe there is a reasonable basis for the position, either the position cannot be taken or we cannot sign the return. In order for us to make these determinations, we must rely on the accuracy and completeness of the relevant information you provide to us, and, in the event we and/or you are assessed penalties due to our reliance on inaccurate, incomplete, or misleading information you supplied to us (with or without your knowledge or intent), you will indemnify us, defend us, and hold us harmless as to those penalties.

We will also provide you with interim and year-end tax planning services on issues that you specifically bring to our attention in writing. Our ability to provide you with appropriate guidance on such issues will be entirely dependent on the timeliness, accuracy, and completeness of the relevant information bearing on the issue which we will rely on you to provide to us. Although we may orally discuss tax planning issues with you from time to time, such discussions will not constitute advice upon which we intend for you to rely for any purpose. Rather, any advice upon which we intend for you to rely, and upon which you will rely, will be embodied in a written report or correspondence from us to you, and any such writing will supersede any prior oral representations between the parties on the issue.

Our fees for this engagement are not contingent on the results of our services. Rather, our fees for this engagement, including tax planning, preparation of your returns, and any representation of your interests during an examination by a taxing authority and/or any subsequent appeal, will be based on our standard hourly rates. All invoices are due and payable upon presentation.

If we elect to terminate our services for nonpayment, or for any other reason provided for in this letter, our engagement will be deemed to have been completed upon written notification of termination, even if we have not completed your return. You will be obligated to compensate us for all time expended, and to reimburse us for all of our out-of-pocket costs, through the date of termination.

You should retain all the documents, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

In connection with this engagement, we may communicate with you or others via email transmission. As emails can be intercepted and read, disclosed, or otherwise used or communicated by an unintended third party, or may not be delivered to each of the parties to whom they are directed and only to such parties, we cannot guarantee or warrant emails from us will be properly delivered and read only by the addressee. Therefore, we specifically disclaim and waive any liability or

responsibility whatsoever for interception or unintentional disclosure of emails transmitted by us in connection with the performance of this engagement. In that regard, you agree that we shall have no liability for any loss or damage to any person or entity resulting from the use of email transmissions, including any consequential, incidental, direct, indirect, or special damages, such as loss of revenues or anticipated profits, or disclosure or communication of confidential or proprietary information.

It is our policy to retain engagement documentation for a period of seven years, after which time we will commence the process of destroying the contents of our engagement files. To the extent we accumulate any of your original records during the engagement; those documents will be returned to you promptly upon completion of the engagement. The balance of our engagement file, other than a copy of your income tax return, which we will provide to you at the conclusion of the engagement, is our property, and we will provide copies of such documents at our discretion, unless required by law, and if compensated for any time and costs associated with the effort.

Because the income tax returns, we are to prepare in connection with this engagement may be joint returns, and because you will each sign those returns, you are each our client. You each acknowledge that there is no expectation of privacy from the other concerning our services in connection with this engagement, and we are at liberty to share with either of you, without the prior consent of the other, any and all documents and other information concerning preparation of your returns. You also acknowledge that unless we are notified otherwise in advance and in writing, we may construe an instruction from either of you to be an instruction on your joint behalf. Absent a contrary written instruction in the future, we will communicate with either or both of you.

In the event we are required to respond to a subpoena, court order, or other legal process for the production of documents and/or testimony relative to information we have obtained and/or prepared during the course of this engagement, you agree to compensate us at our hourly rates, as set forth above, for the time we expend in connection with such response, and to reimburse us for all of our out-of-pocket costs incurred in that regard.

In the event that we are or may be obligated to pay any cost, settlement, judgment, fine, penalty, or similar award or sanction as a result of a claim, investigation, or other proceeding instituted by any third party, and if such obligation is or may be a direct or indirect result of any inaccurate, incomplete, or misleading information that you provide to us during the course of this engagement (with or without your knowledge or intent), you agree to indemnify us, defend us, and hold us harmless against such obligation.

You agree that any dispute (other than our efforts to collect an outstanding invoice) that may arise regarding the meaning, performance, or enforcement of this engagement or any prior engagement that we have performed for you, will, prior to resorting to litigation, be submitted to mediation, and that the parties will engage in the mediation process in good faith once a written request to mediate has been given by any party to the engagement. Any mediation initiated as a result of this engagement shall be administered within the county of Tuscaloosa, Alabama, according to its mediation rules, and any ensuing litigation shall be conducted within said county, according to Alabama law. The results of any such mediation shall be binding only upon agreement of each party to be bound. The costs of any mediation proceeding shall be shared equally by the participating parties.

Any litigation arising out of this engagement, except actions by us to enforce payment of our professional invoices, must be filed within one year from the completion of the engagement, notwithstanding any statutory provision to the contrary.

Our liability relating to the performance of the services rendered under this letter is limited solely to direct damage sustained by you. In no event shall we be liable for the consequential, special, incidental, or punitive loss, damage, or expense caused to you or to any third party (including without limitation, lost profits, opportunity costs, etc.). Notwithstanding the foregoing, our maximum liability relating to services rendered under this letter (regardless of form of action, whether in contract, negligence or otherwise) shall be limited to the fees received by us for this engagement. The provisions set forth in this paragraph shall survive the completion of the engagement.

This engagement letter is contractual in nature and includes all of the relevant terms that will govern the engagement for which it has been prepared. The terms of this letter supersede any prior oral or written representations or commitments by

or between the parties. Any material changes or additions to the terms set forth in this letter will only become effective if evidenced by a written amendment to this letter, signed by all of the parties.

If, after full consideration and consultation with counsel if so desired, you agree to authorize us to prepare your personal income tax returns pursuant to the terms set forth above, please execute this letter on the line below designated for your signature, and return the original of this executed letter to this office along with a completed copy of the enclosed tax information worksheet and the supporting documentation requested therein. You should keep a copy of this fully executed letter for your records. If our firm does not receive from you the original of this letter, in fully executed form, but receives from you a completed copy of the enclosed tax organizer and/or supporting documentation requested therein, then such receipt by our office shall be deemed to evidence your acceptance of all of the terms set forth above. If, however, our office receives from you no response to this letter, then our office will not proceed to provide you with any professional services, and will not prepare your income tax returns.

Thank you for your attention to this matter, and please contact us with any questions that you may have.

Sincerely,

A handwritten signature in blue ink that reads "LeGoy Richardson, P.C." The signature is fluid and cursive, with "LeGoy" on the first line and "Richardson, P.C." on the second line.

Name: (Please Print)

Signature:

Date: