



416 S 6th St, Ste 200
Brainerd, MN 56401

Phone - (218) 829-3501

Credits: see page 4 for required documentation

I (We) assure you that the information provided in this form, along with any other information sheets provided for preparation of my (our) income tax returns is correct to the best of my (our) knowledge and belief. I (We) understand that payment for your services is due upon receipt of my (our) tax returns.

Signature

Signature

Date

Taxpayer(s)

Social Security #

Occupation

Date of Birth

Name(s)

- -

Address

Street

City

State

Zip

If you have any refunds and you would like them to be direct deposited to your account, please provide :

Home Phone _____

Work Phone _____

Cell Phone _____

Cell Phone _____

Fax _____

E-Mail _____

E-Mail _____

Did you or do you plan to make IRA contributions for this year?

Yes _____ No _____

Contributor

Type of Account
(Traditional, Roth, Educ.)

Dates

Amounts

Did you have an interest in or a signature authority over a financial account in a foreign country?

Yes _____ No _____

If Yes : Name of country _____

Did you pay \$2,800 or more to any one household employee this year?

Yes _____ No _____

Do you want to designate \$3 to the federal presidential election campaign fund? Yes _____ No _____

Yes _____ No _____

Do you want to designate \$5 to the state elections campaign fund?

Yes _____ No _____

Yes _____ No _____

Your choice(s) of political party? _____

Did you have a theft or casualty loss over 10% of your gross income after insurance proceeds?

Yes _____ No _____

If yes, please explain : _____

Did you make gifts of more than \$19,000 to any one individual during the year?

Yes _____ No _____

If yes, please explain : _____

Did you receive correspondence from the State or the IRS during the year?

Yes _____ No _____

If yes, please explain : _____

If you want to donate to the Minnesota Nongame Wildlife fund, fill in the amount : Income Tax Return

\$ _____

Property Tax Return

\$ _____

Do you foresee any significant changes to your financial situation that will affect your tax liability for 2026? If so, please explain briefly : _____

Property Tax Refund: If you want us to prepare your Minnesota renter or homeowner property tax refund return Form M-1PR, you need to provide us with your 2025 Certificate of Rent Paid or your 2026 Statement of Property Taxes Due. There is an additional fee for this service.

We will notify you by mail when your tax returns are completed. Please let us know if your mailing address is different from the address above. _____

Taxes Paid**Auto Licenses : List separately**

(Describe):

Real Estate Taxes :

Home.....
 M-1PR Refund Received..... ()
 Second Home/Cabin.....
 Land.....

Sales Tax - on these major purchases: vehicle, boat, home building materials, etc.

Date Paid Federal State
 _____ _____ _____

Income Taxes :

Prior Years Refunds Received.....

Prior Years Additional Payments.....

Estimated Tax Payments:

Prior Year 4th Installment Due January 15, 2025.....
 1st Installment Due April 15, 2025.....
 2nd Installment Due June 15, 2025.....
 3rd Installment Due September 15, 2025.....
 4th Installment Due January 15, 2026.....

Other Deductions

Alimony Paid.....

Tax Preparation Fee.....

Name and Social Security # of Recipient

Safe Deposit Box.....

Work or Job Related Expenses :

Union and Professional Dues.....

Investment Fees and Expenses.....

Work Supplies.....

IRA Maintenance Fees.....

Tools and Safety Equipment.....

Adoption Expenses.....

Required Uniforms and Laundry.....

Explain _____

Trade Journals and Subscriptions.....

Moving Expenses (military active duty).....

Explain _____

Mileage: _____ miles @ \$.21

Your Continuing Education :

(Enter information for your dependents
 education on the dependent questionnaire)

Job Hunting Expenses.....

Tuition and Fees.....

Other Items (Describe) :

Books and Supplies.....

Travel or Miles @ \$.70.....

**If you have expenses for business, work, or farm use of your personal automobile, fill in the required information
 on the separate information questionnaires.**

Please bring the following documents with your information:

W-2 Forms for Wages and Gambling Winnings.
1099 Forms for Interest, Dividends, Stock Transactions, Real Estate Sales, and Miscellaneous Income.
1099 Forms for Pension and IRA Distributions.
1099 Forms for Unemployment Compensation Received.
K-1 Forms for Partnerships, S-Corporations, Estates and Trusts.
1098 Forms for Interest Paid on Mortgages.
1098-E Forms for Interest Paid on Student Loans.
1098-T Forms for Tuition Payments.
1099-C Forms for Cancellation of Debt.
SSA-1099 Forms for Social Security Benefits Received.
RRB-1099 Forms for Railroad Retirement Benefits received.
Real Estate Sales / Purchases Closing Statements.
Contract For Deed - Name, Address, and Social Security # Information.
Refinancing Loan Closing Statements.
Any Tax Notices from the Internal Revenue Service or Minnesota Department of Revenue.

Credits:
Mortgage Interest Credit:
 Mortgage Interest Certificate.
Child & Dependent Care Credit:
 Qualifying Expenses.
Education Credits:
 Forms 1098-T and Cost of Books and Supplies.
Solar, Wind & Geothermal Energy:
 Receipts for Qualified Property.
Adoption Credit:
 Receipts for Qualified Expenses.
Energy Credits:
 Receipts for Energy Efficient Costs.

Payment for tax preparation is expected at the time your returns are filed. All unpaid balances are subject to a

1 1/2% per month (18% annual rate) service charge.

Medical and Dental Expenses

Medical Insurance.....	Ambulance.....
Medicare Insurance.....	Medical Transportation:
Long Term Care Insurance.....	Mileage _____ miles @ \$.21
Taxpayer Spouse	
Name of Company _____	
Policy # (s): _____	Parking, Bus, Taxi.....
Prescription Drugs.....	Motels.....
Glasses and Contacts.....	Other Expenses (Describe) : _____
Hearing Aids.....	
Doctors, Dentists, Hospitals and Clinics : _____ _____ _____ _____	
HSA Contributions.....	Less HSA Reimbursements included above..... ()
	Less Insurance Reimbursements included above..... ()

Interest Paid

Deductible Home Mortgage:	Financial Institution	Amount Paid
Interest Paid to Banks and Other Financial Institutions : List All Mortgages and Equity Loans (Attach All 1098 Forms Received)		
Deductible Mortgage Insurance: (Only Applies to New Mortgages)		
Points Paid on Purchase or Refinance of Mortgage Loans : (Include Copy of Settlement Statement)		
Interest Paid to Individuals on a Contract For Deed : (Payee's Name, Address and Social Security # must be included; failure to provide is subject to a fine)		
Name.....		
Address.....		
Social Security #.....		

Investment Interest :	Interest Paid to	Amount Paid
Investment Loan Relates to :		
Brokerage Margin Account:		
Other (Describe) _____		

Student Loan Interest :		
Student's Name.....		
Interest Paid (Attach 1098-E Forms).....		

Contributions

Only amounts given to qualified charitable organizations qualify. Examples of NON-DEDUCTIBLE amounts are to political organizations and candidates, dues and fees paid to lodges and fraternal orders, raffles, bingo, and pull tabs.

**Please list all of your qualified charitable gifts here as you may receive a deduction even
if you do not itemize deductions.**

Cash Contributions :	Non-Cash Contributions:
Religious Organizations.....	1) Complete the worksheet included with your organizer.
Schools.....	2) You must have a receipt stating the amount received by the organization from the sale of a donated vehicle, boat, etc.
United Way.....	
Boy Scouts / Girl Scouts.....	
Other (Please list) : _____ _____ _____ _____	
Volunteer Mileage : _____ miles @ \$.14	If TOTAL Non-Cash Contributions are: Less than \$250: Receipt not required if impractical. Document donations with written description.
	More than \$250: Receipts required.

**The IRS requires proof for ALL cash contributions to qualified charitable organizations.
(receipt, cancelled check, bank statement, credit card statement, etc.)**