2025 CLIENT COMMUNICATIONS INFORMATION

TAXPAYER

Name _____

Date of Birth _____

Social Security _____

E-mail _____

Best phone number _____

Home address _____

SPOUSE

Name _____

Date of Birth _____

Social Security _____

E-mail _____

Best phone number _____

Home address _____

Preferred communication contact:

Name _____

Preferred channel of communication:

(please check one)

Phone ____

E-mail ____

DL Info

DRIVERS LIC # _____

ISSUING STATE _____

ISSUE DATE _____

EXPIRATION _____

DL Info

DRIVERS LIC # _____

ISSUING STATE _____

ISSUE DATE _____

EXPIRATION _____

Information for Current and New Dependents

Name _____

DOB _____ Social Security _____

Name _____

DOB _____ Social Security _____

Name _____

DOB _____ Social Security _____

Name _____

DOB _____ Social Security _____

If you have a dependent that plans to file 2025 taxes, please confirm if you will claim the dependent or they will claim themselves. To have their own tax return prepared by us, please include their drivers license information below.

Name

DL Info

DRIVERS LIC #_____ ISSUING STATE _____

ISSUE DATE _____ EXPIRATION _____

Name _____

ACCOUNT INFORMATION FOR DIRECT DEPOSITS AND DRAFTS

Bank _____ Type of Account _____Routing Number _____ Account Number_____

If your 2025 tax return has a federal or state refund would you like the amount to be direct deposited in the above account? Please Initial: _____ YES _____ NO

If your 2025 tax return has a balance due for either federal or state would you like the payment due drafted from the above account? Please Initial: _____ YES _____ NO

Starting in September 2025, the IRS began phasing out paper check refunds. To avoid a delay in receiving your refund you may consider including your banking information.

2025 FOREIGN ACCOUNTS AND VIRTUAL CURRENCY

The following questions are required to be answered by the IRS on an annual basis. If you answer yes, to the first question below, please provide the corresponding annual transaction report or 1099.

Please answer with "Y" (yes) or "N" (no):

During 2025:

Did you have an interest or authority over any foreign account, etc? _____

Did you sell, exchange, dispose or receive virtual currency? _____

The following website provides the Frequently Asked Questions regarding the potential tax impact of investments in virtual currency:

https://www.irs.gov/individuals/international-taxpayers/frequently-asked-questions-on-virtual-currency-transactions

2025 ELECTRONIC SIGNATURE ACKNOWLEDGMENT

An Electronic Signature for e-file authorization is now available to all clients for the 2025 tax year.

Tax return results will be available for review before Electronic Signature requests are e-mailed.

If you require an Electronic Signature option due to accessibility or location or if you would like to sign your 2025 tax returns electronically though your e-mail, please answer the questions below.

Note: All Benefield and Hamner, CPA's invoices must be paid in full before tax returns are filed.

An online payment link with your invoice will be e-mailed the same day as your

electronic signature request.

Please initial below.

I would like to utilize Electronic Signature forms to authorize Benefield and Hamner, CPAs to electronically file my 2025 tax return. _____ Yes _____ No

Please mail a printed copy of my 2025 tax return for a minimum $12.00 postage fee. _____ Yes _____No