

Happy New Year! Tax season is upon us once again.

Please provide the following **required** information needed prior to **starting** your returns

Contact Information

Has any of your contact information changed? *Yes No * If yes, please provide the updated information

Bank Information

Has your bank account changed since last year? *Yes No *If yes, please provide:

Your Bank Name _____

Your Account Number _____ OR Please provide a voided check.

Your Routing Number _____

Untaxed Purchases

Illinois is once again asking whether you purchased any items on the internet, from a catalog or while traveling out of state without paying sales tax. If you live outside of Illinois and your state also taxes assesses use tax, please be sure to answer these questions. Did you have any untaxed purchases in 2024? *Yes No

*If yes, please provide the amount of untaxed purchases: \$_____

This amount will be multiplied by 6.25% for Illinois, in order to calculate the amount of use tax to be paid for the year.

Digital Assets – For example: Cryptocurrency (Bitcoin, etc.), NFTs (Non-Fungible Tokens), etc.

At any time during 2024, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or financial interest in a digital asset)? Yes No

Driver's License - Changed in 2024 or 2025? Expired? YES NO

Please check and provide new expiration and issue dates.

Taxpayer

Spouse

DL Number _____

DL Number _____

State of Issue _____

State of Issue _____

NEW Issue Date _____

NEW Issue Date _____

NEW Expiration Date _____

NEW Expiration Date _____

I thank you in advance for answering the above questions. I look forward once again to working with you this year!