



# ACCOUNTING SOLUTIONS

**(716) 681-2694**

[WWW.Tax716.com](http://WWW.Tax716.com)

**2025**

**Must complete and include with your 2025 Tax Return Paperwork**

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_

**1) Return Signatures will be done Electronically must provide both Email Addresses**

EMAIL (Taxpayer) \_\_\_\_\_

EMAIL (Spouse) \_\_\_\_\_

**2) Banking info for Direct Deposit or Payments:** Circle one: **CHECKING** or **SAVINGS**

Routing \_\_\_\_\_ Acct # \_\_\_\_\_

*Refunds must be Direct Deposited as IRS will not send checks anymore*

**3) How would you like to receive your printed copy of the Tax Return from us?**

Check One:  You will **PICKUP**  We **MAIL** to you  
Pickup Hours 10:00 A.M - 1:00 PM Mon-Sat \$15 addl charge to cover priority postage

**4) How much did you contribute to Charity in 2025?**  \$ (Must Provide Proof)

**5) Taxpayer or Spouse renewed Drivers License since last years return filed?**

If Yes include new copy of front and back of License  YES  NO

**6) Did you pay Student Loan Interest in 2025?**  YES  NO

Print 1098 E from Student Loan Website  YES  NO

**7) Did you pay for Child DayCare for dependant in 2025?**  YES  NO

Please Provide statement from Daycare facility  YES  NO

**8) Did you pay College Tuition for yourself or dependant?**  YES  NO

Print 1098 T from Student Portal  YES  NO

**9) Did you pay Property Taxes on Primary Home in 2025?**  YES  NO

Include 2024 paid Property Tax Bills.  YES  NO

**10) Did you install Energy Efficient or Solar in 2025?**  YES  NO

Exterior doors, windows, skylights, insulation materials, central air conditioners, Solar Panels, water heaters, furnaces, boilers, heat pumps. Biomass stoves or boilers ( please include receipt)

**11) Did you receive NYS Unemployment in 2025?**  YES  NO

Print 1099G from NYS Unemployment Website  YES  NO

**12) Did you Purchase a Brand New Vehicle in 2025?**  YES  NO

CANNOT be Used or Leased. Include Receipt and Interest paid on loan  YES  NO

**13) Did you work Overtime in 2025?**  YES  NO

Include copy of final paystub or Employer Statement with your w-2  YES  NO

Additional Info or Questions: