



**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

**7) Did you pay for Child DayCare for dependant in 2025?**

YES

NO

Please Provide statement from Daycare facility

**8) Did you pay College Tuition for yourself or dependant?**

YES

NO

Print 1098 T from Student Portal

**9) Did you pay Property Taxes on Primary Home in 2025?**

YES

NO

Include 2024 paid Property Tax Bills.

**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

**12) Did you Purchase a Brand New Vehicle in 2025?**

YES

NO

CANNOT be Used or Leased. Include Receipt and Interest paid on loan

**13) Did you work Overtime in 2025?**

YES

NO

Include copy of final paystub or Employer Statement with your w-2

Additional Info or Questions: