

McCoy Tax & Accounting, LLC

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Please note:

- If we have not received all necessary information from you by April 1st, we cannot guarantee your tax return will be completed and filed by the IRS filing deadline. If necessary, we will file an extension on your behalf. Be aware that this is an extension of time to file, not a payment extension. Any tax balance due would need to be paid with the extension in order to avoid potential late payment penalties. We assume no liability for late filing or late payment penalties that are beyond our control.

INDIVIDUAL INCOME TAX INFORMATION FOR 2025

TAXPAYER

Name _____ Soc. Sec. No. _____ Birth Date _____

SPOUSE

Name _____ Soc. Sec. No. _____ Birth Date _____

Address _____ Phone #1 _____

Occupation: Taxpayer _____ Spouse _____ Phone #2 _____

County of Residence on Jan. 1, 2025 _____ Email (print clearly) _____

DEPENDENTS *

Name (First, Middle Initial, Last)	College Student	Birth Date	Soc. Sec. No.	Relationship	Months in your home in 2025

*Please be sure that this is "your year" to claim a dependent whose exemption alternates between different taxpayers.

*IRS Form 8332, signed by the custodial parent, is required in order for a non-custodial parent to claim a child as a dependent.

SOURCES OF INCOME

Salaries & Wages (attach W-2s)

\$ _____

\$ _____

\$ _____

\$ _____

Overtime and tip income may be deductible. Detailed information regarding overtime/tips must be reported by your employer on form W-2 or a separate statement.

Other Income (attach forms)

(Social Security, Pension, Unemployment, Gambling, Canceled Debt)

\$ _____

\$ _____

\$ _____

\$ _____

Interest & Dividends (attach 1099s)

\$ _____

\$ _____

\$ _____

\$ _____

For Schedule C Self Employment income,

**Schedule E Rental income, and
Schedule F Farm income, please include
necessary records of income and expenses.**

(Organizers specific to these activities are available online as a printable pdf at www.mccoytax.com)

- Please let us know if some or all of a Required Minimum Distribution (RMD) amount is a Qualified Charitable Distribution (QCD)

Capital Gain/Loss from sale of stocks or other assets

Please attach Form 1099-B, brokerage statements, and any other relevant documents showing sale price and basis information. We MUST have basis information to accurately calculate reportable gain or loss.

ADJUSTMENTS TO INCOME

Educator Expenses \$ _____
 Student Loan Interest Paid \$ _____
 HSA Contributions (not through payroll) \$ _____
 Type of HSA: Individual _____ Family _____
 HSA Distributions \$ _____
 Indiana Private/Homeschool # of children K-12 _____

IRA Contributions:

Traditional - Taxpayer \$ _____
 - Spouse \$ _____
 Roth - Taxpayer \$ _____
 - Spouse \$ _____
 Indiana 529 Plan: Contributions \$ _____
 Acct. # _____

Vehicle loan interest paid (restrictions apply) \$ _____
 Purchase Date _____ VIN _____

2025 QUARTERLY ESTIMATED TAX PAYMENTS (not W-2 withholdings)**Federal:**

Due Date		Date Paid	Amount Paid
April 15, 2025	(1 st Qtr)	_____	\$ _____
June 15, 2025	(2 nd Qtr)	_____	\$ _____
Sept. 15, 2025	(3 rd Qtr)	_____	\$ _____
Jan. 15, 2026	(4 th Qtr)	_____	\$ _____

State:

Date Paid	Amount Paid
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

SCHEDULE A - ITEMIZED DEDUCTIONS**Medical Expenses** (out-of-pocket)**Amount**

Drs., Hospitals, Prescriptions, etc. \$ _____
 Medical Travel -- Miles _____
 Health Insurance (not through employer) \$ _____
 * Including membership in a health sharing ministry
 * If health insurance was through the Healthcare.gov Marketplace, you must include Form 1095-A

Long-term Care Insurance \$ _____

Interest Paid (attach 1098)**Amount**

Mortgage Interest Paid -- Residence \$ _____
 Investment Interest Paid \$ _____

Contributions (attach receipt or statement)

_____ \$ _____
 _____ \$ _____
 _____ \$ _____
 _____ \$ _____
 Contributions to an Indiana College/Univ. \$ _____
 _____ \$ _____

Taxes Paid

Real Estate Tax -- Personal Residence \$ _____
 Real Estate Tax -- Other Property \$ _____
 Vehicle -- County Wheel/Excise Tax \$ _____

CHILD CARE EXPENSE

Number of Children Under 13 _____
 Total Childcare Paid in 2025 \$ _____
 Provider Name _____
 Provider Address _____
 Provider ID Number _____

COLLEGE TUITION & EXPENSES

(attach Form 1098-T and Tuition Statement)

If a taxpayer or dependent attended college in 2025 we will need information indicating amounts paid for tuition and qualified expenses paid in 2025 in order to determine available tax credits. Form 1098-T alone may not be sufficient.

RENT PAID - PERSONAL RESIDENCE

Indiana Property Location _____
 Landlord's Name & Address _____
 Number of Months Rented in 2025 _____ Total Rent Paid in 2025 \$ _____

COMPLIANCE

The IRS requires all filers to answer the following question: "At any time during 2025 did you receive, sell, exchange, or otherwise dispose any financial interest in any virtual currency? (Bitcoin for example) Yes _____ No _____
 If you answer Yes, we will need additional information.

 Contribution to Presidential Election Fund? Taxpayer _____ Spouse _____ or Indiana Endangered Wildlife Fund? Amount \$ _____

If you would like your refund to be direct deposited, please include the necessary information below or attach a voided check.

Bank Name _____ 9-digit Routing Number _____
 Type of Account: _____ Checking _____ Savings _____ Account Number _____
 If we prepared your return last year and you would like to use the same direct deposit account, check here _____

- Please note that our office will be closed for lunch from 12:30 to 1:30 during tax season. A drop box is available outside our door.
- Please drop off or mail tax forms and information to our office in advance. We will call or email with questions and offer review appointments as needed before finalizing the tax return.