

Daley, LaCombe & Charette, PC

Important information required to prepare all 2025 individual income tax returns:

Please be sure you provide us with the following information that we will need to prepare your 2025 tax returns:

- 1- The tax deadline is April 15, 2026 this year. Please make every effort to get your tax information to us by March 15, 2026 to allow ample time for your return to be prepared. If received after March 15, 2026, your return may be extended and not prepared by April 15, 2026.**
- 2- Copy of the front and back of your driver's license(s) for both the taxpayer and spouse, if your license expired in 2025 or 2026.**
- 3- The IRS is requiring direct deposits of your refunds and/or electronic withdrawals of income tax payments due, please provide your bank name, account type (checking or savings), routing and account number.**
- 4- Please provide us with all information related to foreign accounts or foreign assets that you may have.**
- 5- At any time during 2025, 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 a financial interest in a digital asset). If so, please provide the information.**
- 6- If you were paid tips or overtime in 2025, please provide us with your final 2025 paystub if your W-2 does not specifically provide this information.**
- 7- Please provide us with the amount of your NYS Inflation refund check that you received in 2025, if applicable.**
- 8- Please provide us with your IRS identity protection PIN if you received one.**
- 9- We have partnered with SmartVault to provide clients with a safe and secure portal to share files with our firm. If you would like to use this portal and are not already signed up, please provide us with a current e-mail address for you and your spouse, if applicable, so that we can e-mail you an invite.**

E-mail address(es): _____