

Tax Year to be Filed: \_\_\_\_\_  
 Phone # 1: \_\_\_\_\_  
 Phone # 2: \_\_\_\_\_  
 E-Mail: \_\_\_\_\_

**Monty's Tax Service**  
 720 Belvedere Dr.  
 Kokomo, IN 46901  
 765-457-5366 Office #  
 765-457-0462 Fax #  
 mamcamis@comcast.net

Taxpayer Spouse  
 County Lived in 1/1/25: \_\_\_\_\_  
  
**Are you filing Injured Spouse:** \_\_\_\_\_  
*(Injured Spouse DOESN'T owe the Debt)*

Have you moved since  
 filing your 2024 tax  
 return?  
 Yes  
 No

Name (Taxpayer): _____			SS #: _____	Date of Birth: _____			Estimated Taxes Paid				
Name (Spouse): _____			SS #: _____	Date of Birth: _____			Fed	State			
Address: _____			City: _____	St: _____	Zip Code _____		1 <sup>st</sup> Qtr	_____			
Filing Status:	Single	Head of Household	Married Joint	Married Separate (with Spouse Name):  Spouse SS# _____ Are you legally separated in the eyes of the state? _____			Can you be claimed as a dependent on anyone else's tax return?	Yes	No		
	_____	_____	_____	_____	_____	_____	2 <sup>nd</sup> Qtr	_____			
Dependents Names That you are claiming			Claiming Dependent (Circle)	Claiming EIC (Circle)	Relation	Date of Birth	Age	S.S. Number		No. of Months lived with you in 2025 (Circle One)	Was in High School or College in 2025? (Circle One)
1.	Yes / No	Yes / No	_____	_____	_____	_____	_____	_____		(1-5) - (7-12)	Yes No
2.	Yes / No	Yes / No	_____	_____	_____	_____	_____	_____		(1-5) - (7-12)	Yes No
3.	Yes / No	Yes / No	_____	_____	_____	_____	_____	_____		(1-5) - (7-12)	Yes No
4.	Yes / No	Yes / No	_____	_____	_____	_____	_____	_____		(1-5) - (7-12)	Yes No
5.	Yes / No	Yes / No	_____	_____	_____	_____	_____	_____		(1-5) - (7-12)	Yes No

<b>Renters Deduction:</b> Landlord's Name: _____ Landlord's Address: _____  Number of Months Rented: _____ Rent Monthly \$ _____ Total 12 Months \$ _____		<b>Child Care or Babysitting:</b> Provider's Name: _____ Address: _____  SS# or FID # _____ Total Paid for Year: \$ _____	<b>Would you like your refund sent to:</b> Your Home _____ Checking _____ Savings _____ Bank Routing # _____ Bank Account # _____
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Was anyone on the Return a College Students in 2025?: If yes, Ask for a College form and provide the student's 1098T	<b>Student Loan Interest:</b> (provide the student's 1098E) Taxpayer \$ _____ Spouse \$ _____  <b>Did you purchase Affordable Care Act?</b> _____ If Yes, Provide 1095 form	<b>Bring the Following:</b> Interest Statements Social Security Statements Stocks Sold and Basis Amt Misc Business Profit and Loss statements,	Dividend Statements, W2's Unemployment Income 1099's IRA Contributions K1's
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**I verify all the information on this, and all other papers are true. I know I am responsible for checking over my tax return.**  
**I also agree to pay the preparation fees regardless of the return amount and personal materials provided will be held until the fee is satisfied.**

Total Property Tax you paid in 2025 \$ \_\_\_\_\_ SIGN \_\_\_\_\_ DATE \_\_\_\_\_