



Ryan C. Blair, CPA, PLLC
— Taxes • Bookkeeping • Advising —

2025 Individual Tax Return Client Packet

Thank you for choosing us to prepare your 2025 tax return. This organizer packet is designed to help you provide the information we need clearly, accurately, and efficiently. Completing these forms carefully helps reduce follow-up questions and allows us to prepare your return as quickly as possible.

What's Included in This Packet

You may not need to complete every form.

- Individual Tax Return Questionnaire – *Required for all clients*
- Schedule A Organizer – Only if you expect to itemize deductions
- Schedule C Organizer – Only if you own a business or are self-employed
- Schedule E Organizer – Only if you own rental property

If a section does not apply to you, you may skip it.

How to Complete the Forms

1. Answer YES / NO questions first
2. If you answer YES, complete the follow-up details
3. Provide YEAR TOTALS, not monthly amounts
4. Attach supporting documents when available
5. Submit all documents together, not one at a time

How to Submit

- Upload via our secure Taxdome client portal
- Drop off documents at our office (by appointment)

If you have questions while completing this packet,
please contact our office at 828-264-5500.



*Scan Here to Book
Drop Off Appointment*

Final Reminder Checklist

- Engagement Letter must be signed before work can begin
- Incomplete packets may delay preparation

Thank you for your cooperation. We appreciate the opportunity to serve you!

SECTION 1: TAXPAYER INFORMATION

TAXPAYER LAST NAME: _____ TAXPAYER FIRST NAME: _____

PREFERRED METHOD OF CONTACT (CIRCLE ONE): PHONE CALL EMAIL TEXT

SECTION 2: SIGNIFICANT CHANGES

DID YOUR ADDRESS CHANGE IN 2025 (CIRCLE ONE)? YES NO

IF YES:	NEW ADDRESS:	APT #:	
	CITY:	STATE:	ZIP:

DID YOUR MARITAL STATUS CHANGE IN 2025 (CIRCLE ONE)? YES NO

IF YES, PLEASE CIRCLE THE OPTION THAT BEST DESCRIBES YOUR NEW SITUATION IN 2025:

MARRIED DIVORCED SEPERATED WIDOW

WERE THERE ANY BIRTHS, DEATHS, OR ADOPTIONS IN YOUR IMMEDIATE FAMILY IN 2025? YES NO

IF YES, PLEASE LIST BELOW:

NAME:	DATE OF BIRTH:	DATE OF DEATH:	SOCIAL SECURITY NUMBER:
	/ /	/ /	- -
	/ /	/ /	- -

DID YOUR BANKING INFORMATION CHANGE IN 2025 (CIRCLE ONE)? YES NO

IF YES:	BANK NAME:	ROUTING #:	ACCOUNT #:	TYPE OF ACCOUNT:

SECTION 3: INDIVIDUAL TAX RETURN QUESTIONNAIRE (REQUIRED FOR ALL CLIENTS)

Check off YES or NO for each question below:

<input type="checkbox"/>	YES	<input type="checkbox"/>	NO	Will you have itemized deductions that exceed the standard deduction in 2025? <i>If YES, please fill out Schedule A Questionnaire.</i>
<input type="checkbox"/>	YES	<input type="checkbox"/>	NO	Did you have any transactions related to Hurricane Helene damage in 2025? <i>If YES, please explain below:</i>

Explain:

Please continue the questionnaire by flipping over to the back of this page:

	YES		NO	<p>Did you or a member of your household receive health insurance through a government marketplace? <i>If YES, provide a copy of Form 1095-A that you received.</i></p>
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	YES		NO	<p>Did you make 2025 estimated tax payments? <i>If YES, then provide the <u>dates and amounts</u> of each estimated tax payment that you made to the federal and/or state governments.</i></p>
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<p>Federal Estimated Payments:</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>State Estimated Payments:</p> <p>_____</p> <p>_____</p> <p>_____</p>
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	YES		NO	<p>Would you like us to calculate estimated payments for 2026? <i>If YES, please tell us about any changes to your tax situation in 2026.</i></p>
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Explain:

	YES		NO	<p>Do you have foreign bank accounts or financial accounts with funds that amount to more than \$10,000 or \$50,000? <i>If YES, list them below.</i></p>
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List:

	YES		NO	<p>Did an employer pay you or your spouse overtime in 2025? <i>If YES, please attach your last pay stub of the year with the total overtime amount.</i></p>
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	YES		NO	<p>Did you receive any TIPS not reported to you or your spouse on a W2?</p>
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	YES		NO	<p>Did you purchase a NEW vehicle or motorcycle in 2025 for personal use?</p>
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	YES		NO	<p>Did you finance the NEW vehicle or motorcycle you purchased in 2025?</p>
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Please provide year, make, and model of NEW vehicle you purchased in 2025:

ADDITIONAL INFORMATION, COMMENTS, QUESTIONS:			
<i>Please attach any additional information, comments, or questions to this questionnaire when submitting.</i>			

	YES		NO	<p>I have completed the 2025 Tax Return Engagement Letter.</p>
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	YES		NO	<p>All of my tax documents are gathered and attached to this questionnaire.</p>
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