



Client Profile Sheet – Tax Year 2025

Today's Date: ____ - ____ - ____

Customer Type: ☐ New ☐ Existing

Did you receive any Unemployment Payments in 2025? Yes ☐ No ☐

If yes, enter the total amount received: \$ ____.

Filing Status (only one)

- () Single
() Married Filing Joint
() Married Filing Separate
() Head of Household
() Widow(er) w/ Child

Product

- () RT Check (7 to 21 Days)
() Advance Loan up to \$6,000

How did you hear about us?

- () Walk In
() Advertisement Type _____
() Referred By: _____
Phone # (*required*): _____
() Other: _____

How would you like to receive your tax refund? ____ Check ____ Direct Deposit

Have you been audited in the past 5 years? ☐ Yes ☐ No

Are Taxpayer and Spouse legally married? ☐ Yes ☐ No

Interested in speaking with us about Life Insurance? ☐ Yes ☐ No

Did you purchase **Health Insurance** through the Marketplace (healthcare.gov) in 2025? Yes ☐ No ☐

Taxpayer Name _____

Date of Birth _____ Taxpayer SS# _____

Address _____ City _____ State _____ ZIP _____

Cell Phone ____ - ____ - ____ Home Phone ____ - ____ - ____ Work Phone ____ - ____ - ____

Email _____

Spouse Name _____

Date of Birth _____ Spouse SS# _____

Address _____ City _____ State _____ ZIP _____

Cell Phone ____ - ____ - ____ Home Phone ____ - ____ - ____ Work Phone ____ - ____ - ____

Email _____

DEPENDANTS (please list the *YOUNGEST* dependent FIRST)

First Name	Last Name	SS#	Age	Date of Birth	Relationship
_____	_____	_____	____	_____	_____
_____	_____	_____	____	_____	_____
_____	_____	_____	____	_____	_____
_____	_____	_____	____	_____	_____

MOXY Tax Service will prepare your 2025 individual tax return from information that you have provided. We will not audit the information you provided us with. You, the taxpayer, are ultimately responsible for the preparation and filing of your return. I, the taxpayer(s) named above, have provided MOXY Tax Service with the tax information and, to the best of my knowledge, this information is true.

Taxpayer's Signature

Date

Spouse's Signature

Date

Thank you for your Patronage



TAX DECLARATION

ALL RETURNS:

	Yes	No
Have you provided correct identification numbers (photocopies if possible)?.....	<input type="checkbox"/>	<input type="checkbox"/>
Do the names of the return match your social security records, children included?	<input type="checkbox"/>	<input type="checkbox"/>
Are you legally married based on your state's legal definition of marriage?.....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, did your spouse live in your home at any time during July through December?.....	<input type="checkbox"/>	<input type="checkbox"/>
Can someone else claim you/spouse as dependent?.....	<input type="checkbox"/>	<input type="checkbox"/>
Did you/spouse receive any kind of military pay earnings?.....	<input type="checkbox"/>	<input type="checkbox"/>
Did you/spouse receive any kind of housing allowances or government assistance?.....	<input type="checkbox"/>	<input type="checkbox"/>
Did you/spouse live with anyone with a higher adjusted gross income?.....	<input type="checkbox"/>	<input type="checkbox"/>
If yes, but renting a room, do you have a rental agreement?.....	<input type="checkbox"/>	<input type="checkbox"/>

DEPENDENTS AND/OR QUALIFYING CHILDREN:

	Yes	No
Have you verified your dependent's birthday information as entered in the return?....	<input type="checkbox"/>	<input type="checkbox"/>
Did you/spouse provide over 50% of total support for each dependent?.....	<input type="checkbox"/>	<input type="checkbox"/>
Do your EIC qualifying children meet any one of these requirements:		
Under age 19 and lived in the taxpayer's home more than one half year?.....	<input type="checkbox"/>	<input type="checkbox"/>
Under age 19 and foster child of taxpayer and lived in taxpayer's home full year?	<input type="checkbox"/>	<input type="checkbox"/>
Full time student age 19 to 23?.....	<input type="checkbox"/>	<input type="checkbox"/>
Totally disabled and can provide proof?.....	<input type="checkbox"/>	<input type="checkbox"/>
Did your EIC qualifying children live with you in the same main home in the U.S.?.....	<input type="checkbox"/>	<input type="checkbox"/>

I declare that I understand the above questions and have answered them truthfully to the best of my ability.

Signature _____

Date _____

Thank you for your Patronage