



Foothills

INCOME TAX SERVICE

P. O. Box 431, New Hartford, CT 06057 Phone: (860) 738-1040

COMPLETE ONLY IF THERE ARE ANY CHANGES FROM YOUR PRIOR INCOME TAX FILING THROUGH US.

TAXPAYER		SPOUSE	
Name:		Name:	
SS#:		SS#	
Date of Birth:		Date of Birth:	
Occupation:		Occupation:	
Address:	City:	State:	Zip:
Telephone:	Cell:	Email:	

CHILDREN AND OTHER DEPENDENTS

Name:	Birthdate:	SS#:
Name:	Birthdate:	SS#:
Name:	Birthdate:	SS#:
IRA Contributions:	Education Expenses:	

In the event you are due a refund, please provide your direct deposit information: Circle one: Checking or Savings
Routing: _____ Account: _____ Bank Name: _____

COMMON FORMS AND INFORMATION F.I.T.S WILL NEED TO COMPLETE YOUR 2025 INCOME TAX RETURNS

- W-2 for Wages
- 1099's for Pensions, IRA's or Annuity Distributions
- Copy of all W2-G's for Gambling Winnings
- 1095-A for Subsidized Health Insurance, CT Access Health- Not CT Husky
- 1099-SA For HSA/MSA Distributions. Form 5498-SA for Contributions
- 1099-G for Government Payments including Unemployment, Taxable Refunds and Paid Leave
- 1099 Forms for Interest, Dividends, Stock Sales, and Brokerage Accounts
- SSA –1099 Social Security Benefits, Disability and Railroad Retirement.
- 1099-K Third Party Payments
- Schedule K-1 Forms for Partnerships, Corporations, Trusts or Estate Income
- Energy Efficient Primary Home Improvement, EV Purchase Receipts
- Charitable Contribution Receipts
- Year-End Total Time and a Half pay, last pay stub showing year end total.
- 1099-DA- Digital Asset Transactions
- Total Tips if not reported on W2
- Description of any other income received
- New Client prior year income tax return, depreciation schedule.

Applicable Printable Deduction Organizers are available on our website