

2025 Client Intake Questionnaire: No Tax on Overtime & Tips

This form helps your tax preparer determine if you qualify for the new 2025 deductions for overtime pay and tip income under the One Big Beautiful Bill Act. Please complete each section carefully and provide recent pay stubs and W-2s when available.

Section 1 – Employment & Pay Details

1. Are you a W-2 employee? ☐ Yes ☐ No
2. Are you classified as non-exempt and eligible for overtime pay? ☐ Yes ☐ No ☐ Not sure
3. Have you received any written notice from your employer about 'qualified overtime' reporting for 2025? ☐ Yes ☐ No
4. Regular hourly rate: \$_____ Overtime rate (usually 1.5×): \$_____
5. Overtime hours worked in 2025: _____ hours
6. Total overtime pay received (before taxes): \$_____
7. Does your pay stub or W-2 clearly separate overtime pay from regular pay? ☐ Yes ☐ No

Section 2 – Tip Income (if applicable)

8. Do you receive tip income as part of your job? ☐ Yes ☐ No
9. Is your tip income reported through your employer's payroll system? ☐ Yes ☐ No
10. Total tips earned in 2025: \$_____
11. Do you keep a daily tip log or report tips to your employer regularly? ☐ Yes ☐ No

Section 3 – Documentation Checklist

Please provide copies of the following documents if available:

- ☐ 2025 year-to-date pay stubs showing overtime and/or tip income
- ☐ W-2 or other wage statement (once available)
- ☐ Employer statement or memo regarding 'qualified overtime' reporting
- ☐ Tip log or records (if applicable)
- ☐ Any correspondence about new deductions or payroll adjustments

Section 4 – Acknowledgment

I certify that the information provided above is true and complete to the best of my knowledge. I understand that my tax preparer will use this information to determine eligibility for the 2025 No Tax on Overtime and No Tax on Tips deductions.

Client Signature: _____ Date: _____