



# 2022 New Client Drop Off Form

Previous Tax Preparer \_\_\_\_\_

Please include a copy of last years return

I am interested in a Refund Advance Loan

Drop Off Date \_\_\_\_\_

Req Pick Up Date \_\_\_\_\_

<p><b>Primary Taxpayer</b></p> <p>Name _____</p> <p>Address _____</p> <p>City _____ State ____ Zip _____</p> <p>Phone _____ Birthdate _____</p> <p>Occupation _____ SSN _____</p> <p>Email _____</p> <p>Marital Status: <input type="radio"/> Single <input type="radio"/> Married <input type="radio"/> Widowed</p> <p>Are you active in the military? <input type="radio"/> Yes <input type="radio"/> No</p> <p>Is anyone claiming you as a dependent? <input type="radio"/> Yes <input type="radio"/> No</p>	<p><b>Spouse</b></p> <p>Name _____</p> <p>Address _____</p> <p>City _____ State ____ Zip _____</p> <p>Phone _____ Birthdate _____</p> <p>Occupation _____ SSN _____</p> <p>Email _____</p> <p>Are you active in the military? <input type="radio"/> Yes <input type="radio"/> No</p> <p>Is anyone claiming you as a dependent? <input type="radio"/> Yes <input type="radio"/> No</p>
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**Types of Income — Check all that apply**

W2                       W2-G

1099-Misc/NEC       1099-SSA

1099-INT               1099-R

1099-B                  1099-G

1099-S, A or C       Farm/Business

**Tell us about your year (big events, purchases, etc)**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**3rd Economic Impact Payment (Stimulus Checks)**

Did you receive a 3rd stimulus payment in 2021?  Yes  No If Yes, how much (must be exact!) \$ \_\_\_\_\_  
 (Please enclose a copy of Letter 1444-C)

Did you receive **Advance Child Tax Credit** ?  Yes  No If Yes, how much (must be exact!) \$ \_\_\_\_\_

Number of Qualifying Children \_\_\_\_\_ (Please enclose a copy of Letter 6419 from the IRS)

<b>Dependents</b>	<b>Dependent 1</b>	<b>Dependent 2</b>	<b>Dependent 3</b>	<b>Dependent 4</b>
Name				
Birthdate				
Relationship				
SSN				