



Please return with your tax information  
(NOTE: Returns will not be processed until received)

Name: \_\_\_\_\_  
 Best Phone #: \_\_\_\_\_ (Home) OR (Cell) \_\_\_\_\_  
 Email Address: \_\_\_\_\_

<b>Did you move at any time during the year?</b> If yes, please provide date(s):	Yes	No	If yes, new mailing address:
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<b>Did you marry during the tax year?</b>	Yes	No	If yes, Spouse's name, birthday, ss#?
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<b>Did you divorce during the tax year?</b>	Yes	No	If yes, date?
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<b>Did you have dependent change during the year?</b> Explain:	Yes	No	If yes, name, birthday, ss#?
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<b>Did spouse/dependent pass away during year?</b> Explain:	Yes	No	If yes, please provide our office a copy of death certificate and short certificate if applicable
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<b>Over you over 65 and income plus 1/2 of social security under \$45,000?</b>	Yes	No	If yes, we need letter of annual rents paid from your landlord or paid property tax receipts. Pennsylvania has expanded the rebate program.
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<b>Did any of your children graduate high school during year?</b> Note: If in college or trade school, we need copy of Form 1098-T	Yes	No
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<b>Did any of your children graduate college during year?</b> What was date of graduation? Note: If in college or trade school, we need copy of Form 1098-T	Yes	No
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<b>Would you like to e-file or mail your return?</b>	EFILE	MAIL
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<b>If refund, do you desire it to be direct deposited?</b> Note: Voided check (not deposit slip - if not on file) when your information is dropped off	YesDD	NoDD
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<b>Would you like to receive a secure, free electronic return copy immediately upon completion OR a paper copy? (paper copy will be provided if both are circled – SELECT ONLY 1 Option)</b> Note E-Copy: Will generally reduces processing time by average of 5 business days. Note E-Copy: We need your email address	E-Copy	PAPER
	<b>SELECT Only 1</b>	

<b>Federal Estimated Payments (NOT withholding on W2 or 1099)?</b>	Yes	No
<b>State Estimated Payments (NOT withholding on W2 or 1099)?</b>	Yes	No
<b>Local Estimated Payments (NOT withholding on W2 or 1099)?</b>	Yes	No
Note: We will need dates and amounts paid for each one you paid personally noted above		

<b>Did you have healthcare via Exchange (Obamacare)?</b> Note: We will need copy of Form 1095 (especially Form 1095-A)	Yes	No
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<b>Did you receive Form 1099-K (personal cash received payments)?</b> Note: Please provide copy to our office and explanation why you received this form (business/personal)	Yes	No
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<b>Did you invest in any crypto currency during year (Bitcoin etc)?</b> Note: We will need information on any sales or exchanges made	Yes	No
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<b>Did you make charitable contributions during year?</b> If yes, please provide us the total made?	Yes	No
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<b>Are these all of your tax documents?</b> Note: Please indicate if more information will be forthcoming	Yes	No
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Helpful Comments/Notes on above?:	The above information is true and correct Signature/Date:
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