

Phone #: 626-859-7456

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If Faxing or E-Mailing your paper work: Number of pages (including this form) \_\_\_\_\_

# Drop-Off & Mail In Form

<b>Name of person who dropped off:</b>	<b>Date of Drop-Off:</b>
<b>Which tax preparer do you prefer? Circle one:</b>	
Bart	Craig
Rochelle	No Preference/ First Available

Primary Tax Payer Info	Spouse Info
<i>Full Name</i>	<i>Full Name</i>
<i>Last 4 digits of SSN</i> <i>DOB</i>	<i>Last 4 digits of SSN</i> <i>DOB</i>
<i>Mailing Address</i>	<i>Mailing Address (if different from tax payer)</i>
<i>City</i> <i>State</i> <i>Zip Code</i>	<i>City</i> <i>State</i> <i>Zip Code</i>
<i>Phone Number</i>	<i>Phone Number</i>
<i>E-Mail Address</i>	<i>E-Mail Address</i>
<i>Occupation Title</i>	<i>Occupation Title</i>
<i>Drivers License # (new client or expired in 2020)</i>	<i>Drivers License # (new client or expired in 2020)</i>

*Issue Date*                      *Expiration Date*

**Marital Status -**     Single     Married- Joint  
 Married- Separate     Head of Household

**Can anyone claim you as a dependent?**     Yes  
 No

<b>Direct Deposit Information for Refunds:</b>
If your account # is the same as last year, write only the last four digits here: _____
Routing # (if new): _____
Account #: _____
Name of Bank: _____
Checking Account <input type="radio"/> OR Savings Account <input type="radio"/>

**!!!IMPORTANT- PLEASE READ!! - IF INFORMATION IS LEFT BLANK, THE ENTRY WILL BE MADE THAT YOU RECEIVED THE FULL AMOUNT.**

**STIMULUS CHECK INFORMATION:**

In 2020 the government issued two separate forms of stimulus checks as emergency relief funds in response to the Corona Virus pandemic. If you DID NOT receive these funds in the year 2020 and you qualified to receive them (income guidelines can be found on our website), you may be eligible to claim them on this year's tax return. **This is NOT taxable income!** The first stimulus was sent starting in April 2020. The second stimulus was sent starting December 2020- January 2021. **Please mark the following box that applies to you & fill in the amount received:**

**Which stimulus check(s) did you receive? Both are Non-Taxable**

The first one  The second one  Both  Neither

Amount of first check: \$\_\_\_\_\_ Amount of second check: \$\_\_\_\_\_

(Received in April - November 20') (Received in December 20' or January 21')

**Dependents: List the names of ONLY the dependents you can claim & check the box next to their name if they are a full time college student.**

Name:	Student:	Relationship: (if new)	SSN: (if new)	DOB: (if new)
	<input type="radio"/>			
	<input type="radio"/>			
	<input type="radio"/>			
	<input type="radio"/>			
	<input type="radio"/>			

**Your Income Tax Situation: Select all that apply to you or your spouse.**

Do you rent your home or own your home?  Rent  Own

**Income Sources:**

- W2 Income - List # of W2's: \_\_\_\_\_
- Unemployment
- Social Security Income
- Retirement/ Pension
- Interest Income
- Dividends
- Stock Sales
- Self Employment Income
- Expenses from self employment
- Rental Property

**Miscellaneous:**

- Sold or purchased a home (must provide final closing cost statement)
- Paid or received alimony prior to Jan. 1, 2020
- Had gambling winnings of \$600 or more

**Household / Dependents:**

- College tuition (must provide 1098-T form)
- Paid student loan interest (1098-E form)
- Enrolled in a health insurance plan through Covered CA or the exchange market place (must provide 1095-A form)
- Paid for child care/ daycare (if you checked this box, list the name, address, and SSN or EIN of the provider you use in the comments section on line 5 in order to get credit)

*Roybal's Income Tax Service*

We will of course contact you if we have any questions or suggestions regarding your income tax situation, however if you require a phone call from us to discuss questions or concerns that you have, please briefly list the items you would like to discuss, the best time to reach you, and the name of the preferred contact persons.

Yes, please call me to discuss the questions I have written below

Name of contact person: \_\_\_\_\_ Phone #: \_\_\_\_\_

**Comments, questions, or notes you have for us:**

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**Your Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

*By signing, you recognize that you have thoroughly read through this form and if items were left off after your final tax return has been completed, you may be subject to a re-print fee.*

Thank you for your continued business! We are greatly appreciative of your patience as we navigate this new (temporary) way of conducting business in such uncertain times. We hope that you are all doing well and staying healthy.