Fax #: 626-859-7459

Phone #: 626-859-7456

E-Mail:Roybal@roybaltax.com

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

Drop-Off & Mail In Form for Tax Year 2021

Name of person who	dropped o	off:	Date of Drop-Off:		
	Which to	ax preparer do	you prefer? Circle one:		
Bart	Craig	Rochelle	No Preference/ First Available		
1) Primary Tax Payer	r Info		2) Spouse Info		
Full Name			Full Name		
SSN		DOB	SSN DOB		
Mailing Address			Mailing Address (if different from tax payer)		
City	State	Zip Code	City State Zip Code		
Phone Number			Phone Number		
E-Mail Address			E-Mail Address		
Occupation Title			Occupation Title		
Drivers License # (if ne	w OR expire	d in 2021)	Drivers License # (if new OR expired in 2021)		
Issue Date	Ex	piration Date	Issue Date Expiration Date		
Marital Status - ○ Single ○ Married- Joint ○ Married- Separate ○ Head of Household			Direct Deposit Information for Refunds: If your account # is the same as last year, please write the last four digits here:		
Can anyone claim you as a dependent? Yes			Account # (if new):		
		\bigcirc No	Routing #:		
			Name of BanK: Sovings Assourt		
			Checking Account O or Savings Account		

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WHEN DROPPING OFF YOUR PAPERWORK, PLEASE HELP US SPEED UP THE TIME PROCESS BY HAVING ALL TAX DOCUMENTS READY AND OUT OF THEIR ORIGINAL ENVELOPES. THANK YOU!

STIMULUS CHECK INFORMATION:

In March of 2021 the federal government issued a stimulus check (also referred to as the third stimulus) as emergency relief funds in response to the Covid-19 pandemic. This stilumuls was in the amount of \$1,400 per person on your tax return and tax-payers received these funds between March and May of 2021. If you DID NOT receive this stimulus, and believe you may be entitled to it (income guidlines can be found on our website), you may be eligible to claim it on this year's tax return. If you only received a portion of the stimulus and believe you are entitled to receive more, due to adding a new dependent in 2021, write the exact amount you received.

NOTE: IF THIS SECTION IS LEFT BLANK, WE WILL ASSUME YOU RECEIVED THE EXACT AMOUNT YOU WERE ENTITLED TO AND NO FURTHER ACTION WILL BE TAKEN. IF YOU WRITE DOWN THE INCORRECT AMOUNT YOU RECEIVED, IT WILL DELAY YOUR REFUND WITH THE IRS.

Please mark the box that applies to you & fill in the amount you received:						
○ I did not receive a stimulus check in 2021		○ I received my full stimulus check in 2021	I received a portion of the stimulus in the amount of : \$			
3) 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: (only if new)	SSN: (only if new)	DOB: (only if new)		
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ADVANCED CHILD TAX CREDIT:

If you opted to receive the advanced child tax credit between the months of July- December 2021, the IRS issued you a letter with the exact amount you received. We need you to enclose a copy of this letter. If you did not receive it, please go back in your records to calculate the exact amount you received and list it here. We highly recommend that you visit the IRS website to request a copy of this letter, becasue if you provide us with the incorrect amount of advanced child tax credit payments, it can delay your refund significantly.

I received the adaynced	child tax credit in the amount of: \$;

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4) Your Income Tax Situation: Select all that apply to you or your spouse.				
Do you rent your home or own your home?				
Income Sources:	Household / Dependents:			
○ W2 Income - List # of W2 forms:	○ College tuition (must provide 1098-T form)			
○ Unemployment	O Paid student loan interest (1098-E form)			
○ Social Security Income	Enrolled in a health insurance plan through			
Retirement/ Pension	Covered CA or the exchange market place (must			
○ Interest Income	provide 1095-A form)			
○ Dividends	O Paid for child care/ daycare (if you checked this			
○ Stock Sales	box, and did not enclose a form with information,			
○ Self Employment Income/ 1099-NEC (Be sure	please list the amount paid, name, address, and			
to include a list of expenses to help decrease your	EIN or SSN of the provider you use under the			
Self Employment Tax)	comment section)			
○ Rental Property	Miscellaneous:			
○ Virtual Currency	O Sold or purchased a home (must provide final			
	closing cost statement)			
○ Gambling winnings of \$600 or more	O Paid or received alimony prior to Jan. 1, 2020			
you would like a phone call to discuss specific matters while we are working on your return, please briefly list your questions or concerns below, as well as your phone number and the best time to call.				
Phone # Best	Time to Call:			
Comments, questions, or notes you have for us:				
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 greatly appreciate you and hope you have a wonderful and healthy year.