



Drop-off Tax Return Information

(New clients may need to chat with one of our Consultants)

Name _____ Ph: _____
Date material dropped off: _____ Time: _____ Consultant: _____
How did you find us? If by referral, please put the name: _____

Please print and answer all questions completely. If more space is needed, please use the last page.

If you itemize expenses, own rental property, are self-employed, or have other complex issues, please make an appointment with a consultant.

Name: _____ Social Security Number _____
Occupation: _____ Date of birth: _____
Address: _____ City _____ State _____ Zip _____
Phone #: _____ Best time to call? _____ E-mail address: _____

Spouse's name: _____ Social Security Number _____
Spouse's Occupation: _____ Spouses' Date of birth: _____
Address: _____
Phone #: _____ Best time to call? _____ E-mail address: _____

Prior Year

Did you file a tax return in the prior year? ___ No ___ Yes, what form did you file? ___ 1040 ___ 1040NR

Did you owe the Federal ___ No ___ Yes, but did not pay it ___ Yes, paid it, amount _____

Did you owe the State? ___ No ___ Yes, but did not pay it ___ Yes, paid it, amount _____

Did you make estimated tax payments last year? ___ No ___ Yes, paid to IRS _____ Paid to State _____

Did you pay rent last year? ___ No ___ Yes, amount paid \$ _____

Do you take the T or use the fast lane? ___ No ___ Yes, amount paid \$ _____

Do you pay excise taxes? ___ No ___ Yes, amount paid \$ _____

Current Filing Year

Are you claimed as a dependent on another person's return? ___ (such as parents)

Filing Status at 12/31/xx: ___ Married filing jointly ___ Married filing separate ___ Single ___ Head of household

Did you live in more than one state/country in the prior year? ___ No ___ Yes, which state/s or country? _____
From _____ to _____

Did you live in one state but work in another state or country? ___ No ___ Yes, which state/s? _____
From _____ to _____

Dependents:

Name: _____ Date of birth: _____ Social Security Number _____

Name: _____ Date of birth: _____ Social Security Number _____

Did you pay tuition for yourself, spouse or dependent? ____ No ____ Yes, please provide the 1098T and the itemized statement from the college that reconciles with the 1098T. Did you pay for books? How much?

Did you pay child care expenses? ____ No ____ Yes, complete the following:

Name/organization providing care: _____ Federal ID _____

Address _____ Amount \$ _____ Which child? _____

(1) Information being provided to us. **Please note how many of each form below.**

1. ____ Form W2
2. ____ Form 1099 HC
3. ____ Form 1099 INT/DIV
4. ____ Form 1099 R
5. ____ Form 1099 Misc
6. ____ 1099G
7. ____ 1099 SSA
8. ____ Form 1098 Mortgage Statement
9. ____ Real Estate Statement
10. ____ Excise tax
11. ____ Business expense statement
12. ____ Bank Statement
13. ____ Form 1098T
14. ____ IRS Notice, what year/s _____
15. ____ Daycare expenses; (If same as last year, let us know)
16. ____ 1098T
17. ____ 1095 A, B or C. (Please specify.)
18. ____ Other? Explain

(2) Do you own a business? ____ No ____ Yes, we need a list of income and expenses.

(3) Do you own a rental property? ____ No ____ Yes, we need a list of income, expenses, original cost, the date the rental was placed in service and depreciation report. **If the rental is outside your home state, which state?** _____

(4) Were there any major life changes last year?

- ____ Purchased New home?
- ____ Sold your house?
- ____ Foreclosure?
- ____ Did you get married, widowed?
- ____ Did you get divorced?
- ____ Cashed out your 401k or other retirement account
- ____ Started a new business?

- New baby? (need copy of ssn# and possible proof of residency)
- Opened a new bank account? (Returning clients ONLY)
- Paid off your house or took out a home equity line of credit?
- Other; Please explain _____

(5) If you have a refund, do you want direct deposit? No Yes, please provide us with a voided check.

(6) If you owe for federal/or state, do you want to:

- Mail in payment Pay from checking/savings account. (For checking account, please provide a voided check)
- An installment agreement? No Yes **(This is a separate agreement that we can help you with.)**

(7) Are you interested in contributing to an IRA account? No Yes, how much? _____

(8) Did you trade crypto currency in the current year? No Yes I have no idea what crypto is 😊

FOREIGN

(9) Did you have a visa on the last day of the tax year, No Yes, enter your visa type _____ and the date you entered the US on said visa. _____.

(10) Have you previously visited the US? No Yes. If yes, answer questions below.

(i) what visa type did you have? _____.

(ii) what years/dates were you in the US and for how long? _____

(11) Do you own any foreign bank accounts or have signatory authority on said accounts? No Yes, if yes, please answer the questions below:

(iii) was the balance over \$10,000 US **at any time** during the year? No Yes

(iiii) how many foreign bank accounts do you have that qualifies under (iii) above? _____

(12) Do you own foreign real estate? No Yes Yes, it is currently rented.

(13) Do you own foreign mutual accounts? No Yes _____, which country? _____

(14) Other pertinent information we need to know:
