



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, answering all questions completely. If more space is needed, use back of page.

If you itemize expenses, own rental property, are self-employed, or have other complex issues, please make an appointment with one of our consultants.

Name: _____ Social Security Number _____
Occupation: _____ Date of birth: _____
Address: _____
Phone #: _____ (home) 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: _____

Dependents:

Name: _____ Date of birth: _____ Social Security Number _____
Name: _____ Date of birth: _____ Social Security Number _____
Did you pay child care expenses? ____ No ____ Yes, complete the following:

Name/organization providing care: _____ Federal ID _____
Address _____ Amount \$ _____ Which child? _____

Prior Year

Did you file in the prior year? ____ No ____ Yes
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 in the prior year? ____ Paid to IRS _____ Paid to State _____
Did you pay rent last year? ____ 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 one state and work in another state? ___ No ___ Yes, which state? _____
From _____ to _____

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

___ Mail in payment

___ Pay from checking/savings account. (if checking, please provide voided check or routing and account number)

___ An installment agreement? ___ No ___ **Yes, this is a separate agreement that we can help you with.**

If you have a refund, do you want direct deposit? ___ No ___ Yes, please provide us with the routing and account number or a voided check (if checking account.)

Did you make estimated tax payments last year? ___ Paid to IRS _____ Paid to State _____

Do you own a business or a rental property? ___ No ___ Yes, we need a list of income and expenses

Did you have any crypto trades in the current year? ___ No ___ Yes ___ I don't know what crypto is 😊

Tax Documents you are providing. **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

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 _____

TAX YR 2019

A. Of what country or countries were you a citizen or national during the tax year? _____

B. In what country did you claim residence for tax purposes during the tax year? _____

C. Have you ever applied to be a green card holder (lawful permanent resident) of the United States Yes No

D. Were you ever:

1. A US citizen? Yes No

2. A green card holder (lawful permanent resident) of the United States ? Yes No

E. If you had a visa on the last day of the tax year, enter your visa type _____ and the date you entered the US. _____ . If you did not have a visa, enter your immigration status on the last day of the tax year _____

F. Have you ever changed your visa type (nonimmigrant status) or US immigration status? Yes No
If you answered "yes", indicate the date and nature of the change _____

G. List all dates you entered and left the US during 2019

Note: if you are a resident of Canada or Mexico AND commute to work in the US at frequent intervals, check the box for Canada or Mexico and skip to item H Canada Mexico

Dates entered the US
mm/dd/yy

Date departed the US
mm/dd/yy

H. Give number of days (including vacation, nonworkdays, and partial days) you were present in the US during
2017 _____ 2018 _____ 2019 _____

I. Did you file a US income tax return for any prior years? Yes No
If "yes" give the latest year and form number filed _____

J. Are you filing a return or a trust? Yes No
If yes, did the trust have US or foreign owner under the grantor trust rules, make a distribution or loan to a US person, or receive a contribution from a US person?

K. Did you receive total compensation of \$250,000 or more during the tax year? Yes No
If yes, did you use an alternative method to determine the source of this compensation? Yes No

L. Income exempt from tax- If you are claiming exemption from income tax under a US income tax treaty with a foreign country, complete (1) and (2) below.

1.

(a) Country	(b) Tax treaty article	(c) Number of months claimed in prior tax years	(d) Amount of exempt income in current tax year
_____	_____	_____	_____
_____	_____	_____	_____

2. Were you subject to tax in a foreign country on any of the income shown in 1 (d) above? ___Yes ___ No

3. Are you claiming treaty benefits pursuant to Competent Authority determination? ___Yes ___ No

M. 1. This is the first year you are making an election to treat income from real property located in the United States as effectively connected with a U.S. trade or business under section 871(d). Place an x if applicable: _____

2. You have made an election in a previous year that has not been revoked, to treat income from real property located in the United States as effectively connected with a U.S. trade or business under section 871(d). Place an x if applicable: _____

What country issued you a passport? _____

Passport number/s _____

Teachers and Trainees

For teachers:

Enter the name, address, and telephone number of the academic institution where you taught in 2018

Enter the type of US Visa (F,J,M or Q) you held during: the prior six years: 20__ __; 20__ __; 20__ __ 20__ __; 20__ __; 20__ __;

For trainees:

Enter the name, address, and telephone number of the director of the academic or other specialized program you participated in during 2018 _____

Enter the type of US Visa (F,J,M or Q) you held during: the prior six years: 20__ __; 20__ __; 20__ __ 20__ __; 20__ __; 20__ __;

For Students:

Enter the name, address, and telephone number of the academic institution you attended in 2018

Enter the name, address, and telephone number of the director of the academic or other specialized program you participated in 2018

Enter the type of US Visa (F,J,M or Q) you held during: the prior six years: 20__ __; 20__ __; 20__ __ 20__ __;
20__ __; 20__ __;

Were you present in the United States as a teacher, trainee, or student for any part of more than 5 calendar years?
__ Yes __ No

If you checked the "Yes" on the line above, you must provide sufficient facts on an attached statement to establish that you do not intend to reside permanently in the United States.

Professional Athletes:

Enter the name of the charitable sports event(s) in the United States in which you competed during 2018 and the dates of competition. _____

Enter the name(s) and employer identification number(s) of the charitable organization(s) that benefited from the sports event(s): _____

Note: You must attach a statement to verify that all of the net proceeds of the sports event(s) were contributed to the charitable organization(s) listed on line above.

Other pertinent information: _____

