**Personal Tax Drop off checklist**

1. Name, Address & Phone number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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1. School District you live in\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Bank info – Bank name & Acct # (savings or checking) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. kids- SS# and birthdate (if new client will need parents as well) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. Dependents – names (First and last name) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
5. Claiming dependents if not custodial parent – form 8332 filled out (Will need to attach to tax return)
6. Advanced Child Tax Credit received? Yes \_\_\_\_\_ No\_\_\_\_ If yes, we need letter received from IRS
7. Letter received from IRS regarding stimulus payment received early 2021.
8. Insurance – Marketplace 1095A (need 1095A)
9. Vehicle registration
10. Mortgage interest
11. Property tax
12. W-2’s
13. 1099’s (Investments, retirements, annuities)
14. At any time during 2021, did you receive, sell, exchange or otherwise dispose of any financial interest in virtual currency? Yes \_\_\_\_\_\_ No\_\_\_\_ If yes, please provide accounting of all virtual currency transactions for 2021.
15. Do you have financial interest or signature authority over a financial account in a foreign country that had a value greater than $10,000 at any time in 2021? Yes\_\_\_\_ No\_\_\_\_\_ If yes, we will need additional information from you.