



[taxconsultant@thetaxrecovery.com](mailto:taxconsultant@thetaxrecovery.com)

708.860.2212

## THE TAX RECOVERY

TAX PREPARATION SERVICE

### Client Drop Off Questionnaire Tax Year 2022

Please fill in your personal information and provide the most appropriate answers for questions below. Completed documents can be sent directly to [taxconsultant@thetaxrecovery.com](mailto:taxconsultant@thetaxrecovery.com)

#### Personal Information

##### ***Taxpayer:***

Full Name: \_\_\_\_\_

Address: \_\_\_\_\_

Occupation: \_\_\_\_\_

##### ***Spouse, if applicable:***

Full Name: \_\_\_\_\_

Address: \_\_\_\_\_

Occupation: \_\_\_\_\_

#### ***Contact Information:***

Best Number to be reached: \_\_\_\_\_

Email Address: \_\_\_\_\_

#### **Questions**

1. Would you like to sign up for our newsletter? (If yes, please provide email above) ☐ \_Yes ☐
2. What is your filing status? ☐ \_Married Filing Jointly ☐ \_Married Filing Separately ☐ \_Single ☐ \_Head of Household  
If Head of Household, were you unmarried on the last day of the tax year and provided more than half of the cost of keeping up a home for the year for the qualifying person? ☐ \_Yes ☐ \_No
3. Did you Buy or Sell a Home in 2022? ☐ \_Yes ☐ \_No
4. Do you want \$3 to go to Presidential Election Campaign? ☐ \_Yes ☐ \_No
5. Did you, your spouse, or dependent(s) have Health Insurance Coverage with ObamaCare in 2022?  
☐ \_Yes ☐ \_No
6. Did you or your spouse at any time during 2022 receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? ☐ \_Yes ☐ \_No
7. IF receiving a refund, do you want Direct Deposit? ☐ \_Yes ☐ \_No
8. If yes, please provide routing and account number \_\_\_\_\_

*Additional Questions On Page 2*

*Dependent Information:*

Full Name : \_\_\_\_\_

*Dependent Information:*

Full Name : \_\_\_\_\_

*Dependent Information:*

Full Name : \_\_\_\_\_

*Dependent Information:*

Full Name : \_\_\_\_\_

**Questions**

1. Is the child a US Citizen, National, or Resident Alien? \_\_\_\_\_

2. How many months has the child lived in your household in 2022? \_\_\_\_\_

3. Please provide one of the following:

- Birth Certificate (PREFERRED)
- Social Security Card
- School Record (NOT A REPORT CARD)