



New? We need last year's taxes if so.
Need DOB's and SSNs for everyone on return.

(OFFICE) Date Received: _____

TY24 DROP-OFF REQUIREMENTS

➔ TAXPAYER NAME: _____ Occupation: _____

SPOUSE NAME: _____ Occupation: _____

Preferred Contact for ?s : Person _____ Phone: _____ Text: Y N

Taxpayer Email: _____ *required for eSignature

Spouse Email: _____ *required for eSignature

*Email will be used to send Client Letter for Following Season

HOW DO YOU WANT YOUR FINISHED RETURN?

One type is included. Both is \$10 fee.

PRINTED COPY/Sign by hand _____

ELECTRONIC COPY/eSignature _____

➔ Taxpayer Driver's License: _____ State: _____ Issued: _____ Exp: _____ DOB: _____

Spouse Driver's License: _____ State: _____ Issued: _____ Exp: _____ DOB: _____

➔ Current Address: _____

➔ Did you buy, sell or exchange any virtual currency? Yes or No

➔ Did you want any refund(s) direct deposited? Y or N

Same bank as Last year? Y or N _____ BANK NAME PLEASE _____

CHECKING ACCT _____ SAVINGS ACCT _____

Routing #: _____

Acct #: _____

Pay Later with Quick Collect Option?

For a fee, Want us to pull our fee from your refund? Initials please _____

\$15 fee for Quick Collect on top of your standard prep fees. *Drivers License/ID Required per spouse.*

➔ Did you have Marketplace Health Insurance? _____

We need your 1095-A(s) *You will get a 1095-A form, per policy you paid for separately, during the year. They are mailed as well as sitting in your Login for Acct.

Are you over 65 and pay for Medical Premiums out of pocket?

Health, LTC, Supplemental Plans, Dental, Vision are all deductible on Iowa.

PREPARE

1ST AVAILABLE _____

ANDI _____

JACI _____

KYLIE _____

Home Energy Improvements:

Will Need \$\$ paid and maybe more info

Ext. Doors _____ Electric Vehicle _____

Ext. Windows _____ Solar _____

Geothermal _____ Water Heater _____

Furnace _____ Energy Audit _____

Insulation Material _____

If you owe Iowa, would you like us to setup an automatic withdrawal on **April 30th, 2025**

(Due date), for that amount from your given bank account? Yes or No

↓
Do you own a home?

Can you get this above \$14,600 per spouse?

Do we have your Mortgage Interest? (Form 1098) _____

Prop Taxes Paid in 2023? (May be on Form 1098) _____

Vehicle Registrations for 2023? _____

Make & Models: _____

Cash Donations? (Red Kettle, GS, BS) _____

Property Donations? (Goodwill) _____

Have Lottery Winnings? _____ *Do we have your losses?* _____

Got kids?! →

If you share children with someone else, please bring us your court paperwork to make a copy for your file.



Clients with Children



Please list all dependent children (*in full-time school under age 23*) being claimed on this year's return:

1. _____ 2. _____ 3. _____ 4. _____
 5. _____ 6. _____ 7. _____ 8. _____

Did you add or subtract any children on this year's return?

Who? : _____

Why?: _____

New Children? New Dependent(s)?

Name	DOB	SSN
A. _____	___/___/___	___-___-___
B. _____	___/___/___	___-___-___
C. _____	___/___/___	___-___-___



Are you Claiming a Child or Children whom DO NOT LIVE WITH YOU?

Do we have a current 8332 from the custodial parent on file? **Yes** **No**

(Form 8332 is **required** when claiming a child whom does not live with you, the majority of the year.)

*Ask if you need one to take with you to have the custodial parent fill it out.

If in K-12th grades: Cost of School Registration (per child)? 1. _____ 2. _____ 3. _____ 4. _____

Cost of School Supplies (per child)? Not clothes/shoes..... 1. _____ 2. _____ 3. _____ 4. _____

Extra School Fees or Dance ticket costs (per child)? 1. _____ 2. _____ 3. _____ 4. _____

Band Fees/Required Band Expenses (per child) 1. _____ 2. _____ 3. _____ 4. _____

Did you put into an IOWA 529 Plan? 1. _____ 2. _____ 3. _____ 4. _____

Spouse put into an IOWA 529 Plan? 1. _____ 2. _____ 3. _____ 4. _____

Daycare/Preschool? Did you include the Daycare/Preschool information?

Name, Address, SSN or EIN of Provider + total(s) paid per child.

COLLEGE? Your College Child did or will receive a 1098 Form that we need. Plus, their book costs and special tools or materials for classes. No laptops/printers.

NOTES to PREPARER: _____

