

Returning Customer Drop Off Form

Date: _____

Taxpayer & Spouse Names: _____

Address: _____

Phone #: _____ Text ok? Yes No

Email: _____

Did you have any **new children**? Yes No

Did you collect state **unemployment**? Yes No

Did you **move, buy** or **sell** a home? Yes No

-If you **RENT** how much do you pay annually? _____ heat included? _____

Did you buy or sell any **virtual currency (crypto)**? Yes No

Did you take any distributions from an **HSA**? (Health Savings Acct) Yes No

Did you pay any **Daycare/Private School/529/College Tuition**? Yes No

Did you have **Health Insurance** through Marketplace? Yes No

Do you own any **rental properties** or **small businesses**? Yes No

Did you take any money out of an **IRA, 401K, retirement fund**? Yes No

IF YOU ANSWERED YES TO ANY OF THE ABOVE, MAKE SURE TO INCLUDE INFO IN NOTES AND DOCUMENTS WITH RETURN

Bank: _____ checking _____ savings _____

Routing: _____ Acct: _____

PLEASE MAKE SURE TO CONFIRM BANK INFO OR YOU MAY NOT RECEIVE YOUR REFUND

Notes/Questions for Preparer:

Make sure to include the following if applicable:

- | | |
|---|---|
| <input type="checkbox"/> W2 (Wages) | <input type="checkbox"/> 1099G (Unemployment) |
| <input type="checkbox"/> 1099R (Retirement) | <input type="checkbox"/> Mortgage Interest/Property Taxes |
| <input type="checkbox"/> 1099SSA (Social Security) | <input type="checkbox"/> 1098T (Tuition Expenses) |
| <input type="checkbox"/> 1099B (Stock Sales/Investments) | <input type="checkbox"/> 1095A (Marketplace Ins) |
| <input type="checkbox"/> Crypto | <input type="checkbox"/> 1098E (Student Loan Int) |
| <input type="checkbox"/> 1099INT or 1099DIV (Bank Interest/Dividends) | <input type="checkbox"/> Daycare Expenses |
| <input type="checkbox"/> 1099MISC (Self Employment) | <input type="checkbox"/> 1099SA (HSA Dist) |
| | <input type="checkbox"/> Residential Energy Credit |