

Drop Off Form (Returning Clients 2023)

Today's Date _____

Taxpayer Name _____

Spouse Name _____

Phone Number _____

Spouse Phone _____

EMAIL address: _____

Spouse Email: _____

****Address Change? (Yes or No)**

If YES, please fill out new address:

Number, Street, Apt _____

City and Zip _____

****Change in Filing Status? (Yes or No):**

If YES, please choose: Single Married filing Jointly Married filing Separately Head of Household

If change in filing status is a result of marriage, please provide the following information for new spouse:

Name _____

Date of birth _____

SSN _____

Driver's License: (see below)

****Change in Dependents? (Yes or No) Let us know if you are NO LONGER claiming a child.**

If new dependent, please fill out dependent info:

Name _____

Date of Birth _____

SSN _____

****New Bank Account? (Yes or No or N/A) (for direct deposit or direct debit, if applicable)**

If YES, please fill out new account info:

Bank Name _____ Checking or Savings (circle one)

Routing # _____

Account # _____

1. Was anybody covered through the **Marketplace (Obamacare)**? (Yes or No) If YES, please provide **form 1095A**.
2. Did you receive, sell, exchange, or have any financial interest in **cryptocurrency** (e.g., bitcoin)? (Yes or No).
3. Do any of the following apply?
 - a. Teacher Deduction (yes or no) (Only for K-12 teachers) _____
 - b. IRA contributions (does **NOT** include retirement plans thru work) (yes or no)
Taxpayer contribution \$ _____ Spouse contribution \$ _____ (Roth or Traditional)
 - c. Out-of-pocket College expenses for you or dependents? (yes or no) If yes, we need form(s) **1098-T**
 - d. Student Loan Interest paid in 2023? (yes or no) If yes, we need form **1098-E**
 - e. Home energy improvements? (yes or no) If yes, please provide information.
 - f. Purchased Qualifying Electric Vehicle or Fuel Cell Vehicle? (yes or no) If yes, please provide information.
 - g. Did you pay for childcare? (yes or no) If yes, please provide form from provider
 - h. Other: _____
4. Did You **RENEW** or get a **NEW** driver's license in 2023 or 2024? (Yes or No) If YES, please provide updated license information below:

Taxpayer

DL# _____

State _____

Issue Date _____

Exp Date _____

Spouse

DL# _____

State _____

Issue Date _____

Exp Date _____

ADDITIONAL

NOTES/INFORMATION: _____