## **Drop Off Form (Returning Clients 2024)**

l	's Date yer Name	Spouse Name	
none	Number	_ Spouse Phone	
MAI	L address:	_ Spouse Email:	
	**Address Change? (Yes or No)		
	If YES, please fill out new address:		
	Number, Street, Apt		
	City and Zip	<del></del>	
	**Change in Filing Status? (Yes or No):	. Married filing Congretals. Head of Household	
	If <u>YES</u> , please choose: Single Married filing Jointly	Married fining Separately Head of Household	
	If change in filing status due to NEW spou		
	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 <b>new dependent</b> , please fill out dependent info:	vir you are no Longer Claiming a Clinu.	
	Name		
	Date of Birth	<del></del>	
	SSN	<del></del>	
	**New Bank Account? (Yes or No or N/A) (for div	ect deposit or direct debit, if applicable)	
	If <u>YES</u> , please fill out new account info:		
	Bank Name	Checking or Savings (circle one)	
	Routing #		
	A		
	Account #		
1.	Was anybody covered through the Marketplace (Ob	amacare)? (Yes or No) If <u>YES</u> , we need form 1095A.	
1. 2.	Was anybody covered through the Marketplace (Ob	amacare)? (Yes or No) If <u>YES</u> , we need form 1095A.	
	Was anybody covered through the <b>Marketplace</b> ( <b>Ob</b> Did you receive, sell, or exchange any <b>cryptocurren</b> . Do any of the following apply? If none apply, you of	amacare)? (Yes or No) If <u>YES</u> , we need form 1095A. cy (e.g., dogecoin)? (Yes or No). If you sold, we need infean write NO:	
2.	Was anybody covered through the <b>Marketplace</b> ( <b>Ob</b> Did you receive, sell, or exchange any <b>cryptocurren</b> . Do any of the following apply? If none apply, you ca. Teacher Deduction ( <b>Yes or No</b> ) ( <b>Only for K-12</b> )	amacare)? (Yes or No) If <u>YES</u> , we need form 1095A. cy (e.g., dogecoin)? (Yes or No). If you sold, we need interaction write NO:	
2.	Was anybody covered through the <b>Marketplace</b> ( <b>Ob</b> Did you receive, sell, or exchange any <b>cryptocurren</b> . Do any of the following apply? If none apply, you ca. Teacher Deduction ( <b>Yes or No</b> ) ( <b>Only for K-12</b> b. IRA contributions (does <b>NOT include</b> retirements	amacare)? (Yes or No) If <u>YES</u> , we need form 1095A. cy (e.g., dogecoin)? (Yes or No). If you sold, we need interaction write NO: teachers) How much (up to \$300)? plans thru work) (Yes or No)	
2.	Was anybody covered through the Marketplace (Ob Did you receive, sell, or exchange any cryptocurrent Do any of the following apply? If none apply, you ca. Teacher Deduction (Yes or No) (Only for K-12 b. IRA contributions (does NOT include retirement Taxpayer contribution \$ Spous	amacare)? (Yes or No) If <u>YES</u> , we need form 1095A.  cy (e.g., dogecoin)? (Yes or No). If you sold, we need inform write NO:  teachers) How much (up to \$300)?  plans thru work) (Yes or No)  e contribution \$ (Roth or Traditional)	
2.	Was anybody covered through the Marketplace (Ob Did you receive, sell, or exchange any cryptocurrent Do any of the following apply? If none apply, you ca. Teacher Deduction (Yes or No) (Only for K-12 b. IRA contributions (does NOT include retirement Taxpayer contribution \$ Spous c. Out-of-pocket College expenses for you or depend	amacare)? (Yes or No) If <u>YES</u> , we need form 1095A.  Ey (e.g., dogecoin)? (Yes or No). If you sold, we need inform write NO:  Exact the eachers of the eache	
2.	Was anybody covered through the Marketplace (Ob Did you receive, sell, or exchange any cryptocurrent Do any of the following apply? If none apply, you ca. Teacher Deduction (Yes or No) (Only for K-12 to IRA contributions (does NOT include retirement Taxpayer contribution \$ Spous cout-of-pocket College expenses for you or depend. Student Loan Interest paid in 2024? (Yes or No)	amacare)? (Yes or No) If <u>YES</u> , we need form 1095A.  Exy (e.g., dogecoin)? (Yes or No). If you sold, we need inform write NO:  Exact the eachers of the each	
2.	Was anybody covered through the Marketplace (Ob Did you receive, sell, or exchange any cryptocurrent Do any of the following apply? If none apply, you ca. Teacher Deduction (Yes or No) (Only for K-12 to IRA contributions (does NOT include retirement Taxpayer contribution \$ Spous c. Out-of-pocket College expenses for you or depend. Student Loan Interest paid in 2024? (Yes or No) e. Home ENERGY improvements? (Yes or No) If	amacare)? (Yes or No) If <u>YES</u> , we need form 1095A.  by (e.g., dogecoin)? (Yes or No). If you sold, we need into the san write NO:  be cachers) How much (up to \$300)?  plans thru work) (Yes or No)  contribution \$ (Roth or Traditional)  dents? (Yes or No) If yes, we need form(s) 1098-T  If yes, we need form 1098-E  yes, please provide information.	
2.	Was anybody covered through the Marketplace (Ob Did you receive, sell, or exchange any cryptocurrent Do any of the following apply? If none apply, you ca. Teacher Deduction (Yes or No) (Only for K-12 b. IRA contributions (does NOT include retirement Taxpayer contributions \sum Spous c. Out-of-pocket College expenses for you or depend. Student Loan Interest paid in 2024? (Yes or No) e. Home ENERGY improvements? (Yes or No) If f. Purchased Qualifying Electric Vehicle or Plug-in	amacare)? (Yes or No) If <u>YES</u> , we need form 1095A.  Ey (e.g., dogecoin)? (Yes or No). If you sold, we need infinite an write NO:  Exercise How much (up to \$300)?  plans thru work) (Yes or No)  e contribution \$	
2.	Was anybody covered through the Marketplace (Ob Did you receive, sell, or exchange any cryptocurrent Do any of the following apply? If none apply, you ca. Teacher Deduction (Yes or No) (Only for K-12 to IRA contributions (does NOT include retirement Taxpayer contribution \$ Spous c. Out-of-pocket College expenses for you or depend. Student Loan Interest paid in 2024? (Yes or No) e. Home ENERGY improvements? (Yes or No) If	amacare)? (Yes or No) If <u>YES</u> , we need form 1095A.  Ey (e.g., dogecoin)? (Yes or No). If you sold, we need infinite an write NO:  Exercise How much (up to \$300)?  plans thru work) (Yes or No)  e contribution \$	
2. 3.	Was anybody covered through the Marketplace (Ob Did you receive, sell, or exchange any cryptocurrent Do any of the following apply? If none apply, you can a. Teacher Deduction (Yes or No) (Only for K-12 to IRA contributions (does NOT include retirement Taxpayer contribution \$ Spous contribution \$	amacare)? (Yes or No) If <u>YES</u> , we need form 1095A.  Exy (e.g., dogecoin)? (Yes or No). If you sold, we need into the san write NO:  Expeachers) How much (up to \$300)?  Plans thru work) (Yes or No)  Hybrid? (Yes or No) If yes, we need form(s) 1098-T  Hybrid? (Yes or No) If yes, please provide info.  Hybrid? (Yes or No) If yes, please provide info.	
2.	Was anybody covered through the Marketplace (Ob Did you receive, sell, or exchange any cryptocurrent Do any of the following apply? If none apply, you ca. Teacher Deduction (Yes or No) (Only for K-12 bb. IRA contributions (does NOT include retirement Taxpayer contribution \$ Spous c. Out-of-pocket College expenses for you or depend. Student Loan Interest paid in 2024? (Yes or No) e. Home ENERGY improvements? (Yes or No) If f. Purchased Qualifying Electric Vehicle or Plug-ing. Did you pay for childcare? (Yes or No) If yes, purchased You RENEW or get a NEW driver's license since	amacare)? (Yes or No) If <u>YES</u> , we need form 1095A.  by (e.g., dogecoin)? (Yes or No). If you sold, we need into the san write NO:  be cachers) How much (up to \$300)?  plans thru work) (Yes or No)  contribution \$	
2. 3.	Was anybody covered through the Marketplace (Ob Did you receive, sell, or exchange any cryptocurrent Do any of the following apply? If none apply, you can a. Teacher Deduction (Yes or No) (Only for K-12 to IRA contributions (does NOT include retirement Taxpayer contribution \$ Spous contribution \$	amacare)? (Yes or No) If <u>YES</u> , we need form 1095A.  by (e.g., dogecoin)? (Yes or No). If you sold, we need inform write NO:  ceachers) How much (up to \$300)?  plans thru work) (Yes or No)  ce contribution \$	
2. 3.	Was anybody covered through the Marketplace (Ob Did you receive, sell, or exchange any cryptocurrent Do any of the following apply? If none apply, you can a. Teacher Deduction (Yes or No) (Only for K-12 b). IRA contributions (does NOT include retirement Taxpayer contribution \$ Spous contribution \$	amacare)? (Yes or No) If YES, we need form 1095A.  cy (e.g., dogecoin)? (Yes or No). If you sold, we need inform write NO:  ceachers) How much (up to \$300)?  plans thru work) (Yes or No)  contribution \$ (Roth or Traditional)  dents? (Yes or No) If yes, we need form(s) 1098-T  If yes, we need form 1098-E  yes, please provide information.  Hybrid? (Yes or No) If yes, please provide info.  clease provide form from provider  the last year (or since we last prepared your return)? (Yes or no) below:	
2. 3.	Was anybody covered through the Marketplace (Ob Did you receive, sell, or exchange any cryptocurrent Do any of the following apply? If none apply, you can a Teacher Deduction (Yes or No) (Only for K-12 to IRA contributions (does NOT include retirement Taxpayer contribution \$ Spous contribution \$	amacare)? (Yes or No) If YES, we need form 1095A.  Ey (e.g., dogecoin)? (Yes or No). If you sold, we need inform write NO:  Eleachers) How much (up to \$300)?  Plans thru work) (Yes or No)  Eleachers)  Hybrid? (Yes or No) If yes, we need form(s) 1098-T  Eyes, please provide information.  Hybrid? (Yes or No) If yes, please provide info.  Plans thru work (Yes or No) If yes, please provide info.  Eyes, please provide form from provider  Eyes last year (or since we last prepared your return)? (Yes or no)  Eyes below:	
2. 3.	Was anybody covered through the Marketplace (Ob Did you receive, sell, or exchange any cryptocurrent Do any of the following apply? If none apply, you can a Teacher Deduction (Yes or No) (Only for K-12 to IRA contributions (does NOT include retirement Taxpayer contribution \$ Spous contribution \$	amacare)? (Yes or No) If YES, we need form 1095A.  by (e.g., dogecoin)? (Yes or No). If you sold, we need inform write NO:  ceachers) How much (up to \$300)?  plans thru work) (Yes or No)  ce contribution \$	
2. 3.	Was anybody covered through the Marketplace (Ob Did you receive, sell, or exchange any cryptocurrent Do any of the following apply? If none apply, you can teacher Deduction (Yes or No) (Only for K-12 to IRA contributions (does NOT include retirement Taxpayer contribution \$ Spous contribution \$	amacare)? (Yes or No) If YES, we need form 1095A.  by (e.g., dogecoin)? (Yes or No). If you sold, we need into the san write NO:  be cachers) How much (up to \$300)?  plans thru work) (Yes or No)  contribution \$	
2. 3.	Was anybody covered through the Marketplace (Ob Did you receive, sell, or exchange any cryptocurrent Do any of the following apply? If none apply, you can teacher Deduction (Yes or No) (Only for K-12 to IRA contributions (does NOT include retirement Taxpayer contribution \$ Spous contribution \$	amacare)? (Yes or No) If YES, we need form 1095A.  by (e.g., dogecoin)? (Yes or No). If you sold, we need inform write NO:  leachers) How much (up to \$300)?  plans thru work) (Yes or No)  elecontribution \$	
2. 3.	Was anybody covered through the Marketplace (Ob Did you receive, sell, or exchange any cryptocurrent Do any of the following apply? If none apply, you can teacher Deduction (Yes or No) (Only for K-12 to IRA contributions (does NOT include retirement Taxpayer contribution \$ Spous contribution \$	amacare)? (Yes or No) If YES, we need form 1095A.  by (e.g., dogecoin)? (Yes or No). If you sold, we need inform write NO:  ceachers) How much (up to \$300)?  plans thru work) (Yes or No)  ce contribution \$	