

CLIENT INFORMATION / DROP-OFF FORM

**Please complete and include with other paperwork when dropping off or sending your tax documents.
Please print LEGIBLY.**

Name:

Taxpayer First & Last Name

Spouse First & Last Name

Taxpayer's Driver's License Number

Spouse's Driver's License Number

Taxpayer's Driver's Issue & Expiration Dates

Spouse's Driver's License Issue & Expiration Dates

Preferred person to contact for questions: _____

Preferred Contact Phone Number: _____

Email: _____

Please answer the following Questions

1. Did your address change? ___ YES ___ NO If yes, new address: _____
2. Did anyone go to college with tuition and supplies expense? \$ _____ Include Form 1098T.
3. Donation Amounts: Cash (includes checks, credit cards, etc.) \$ _____ Non-cash \$ _____
4. Did you make contributions to an HSA? \$ _____ Include Form 1099-SA.

Please provide a canceled check or your bank routing and account number

Routing Number _____

Account Number _____

Please provide the amount received for your 2021 stimulus payment. The IRS will adjust your return for an incorrect amount and will delay any refund due. IRS sent out Form 1444-C IN January 2022.

Stimulus #3 (March 2021) \$ _____

During 2021, did you receive, sell, send, exchange or otherwise acquire financial interest in any virtual currency? ___ YES ___ NO If yes, please include a Profit/Loss Summary.

Please provide the amount received for the advance child tax credit payments. To verify your payments either include the letter your received from the IRS detailing the payments received or go to the child tax credit portal at: www.irs.gov. Select manage your child tax credit payments and log into your account. If you do not have any account, you will need to create an account. The IRS will adjust your return for incorrect amounts reported and will delay any refund due.

	July	August	September	October	November	December
Taxpayer						
Spouse						

Please let us know of any changes to your family or any information that will affect your tax return. Examples include new dependents, marriage, divorce, death, etc.