

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 and State

Spouse's Driver's License Number and State

Taxpayer's Driver's License [Issue & Expiration Dates]

Spouse's Driver's License [Issue & Expiration Dates]

Preferred person to contact for questions: _____

Preferred Contact Phone Number: _____

Email: _____

Preferred method of contact: Phone Call E Mail Either

Please answer the following questions:

1. Did your address change? NO YES If yes, new address: _____
2. Did anyone go to college with tuition and supplies expense? NO YES If yes, include Form 1098T.
3. Donation Amounts: cash (includes checks, credit cards, etc.) \$_____ non-cash \$_____
4. Did you have distributions from an HSA? NO YES If yes, include Form 1099-SA.
5. Did you receive any Form 1099-K's? NO YES If yes, please provide these.
6. Did your bank account information change? NO Yes If yes, please provide updated information
Routing Number _____ Account Number _____ Checking or Savings
7. Do you wish to contribute to the MN Nongame Wildlife Fund? This will reduce your refund or increase the amount you owe. NO YES If yes, please indicate amount \$_____
8. Do you anticipate a balance owed for either federal or state? NO YES
9. Did you have any additional income from sources where you have not yet received documentation? (K-1's, 1099's, etc.) NO Yes If yes, please indicate what you are waiting for and when you expect to receive.

10. Did you sell, receive, send, exchange, or otherwise acquire financial interest in any Virtual Currency? NO YES
If yes, please include consolidated Form(s) 1099 and/or Form(s) 8949
11. Did you (or your spouse) receive front-line worker pay from Minnesota? NO YES

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, sale of house, etc.

Thank you.