

## Drop Off Form

Date of Drop off \_\_\_\_\_

Thank you for your continued business. We want your tax preparation experience to be as stressless as possible.

It is your responsibility to ensure that all information is provided to complete your tax return. If you have had changes that will affect your taxes, you must tell us, i.e. marriage, divorce, new born, death, new home, adoption, fostering, etc...

All 1040 Individual Income Tax Returns are due April 15th. Any information dropped off on or after April 1st will not be guaranteed to be complete before the due date. An extension will be filed for you. If you know that you will owe, it is your responsibility to make sure that payment is sent to the IRS on time.

The following page is to help us make sure that we have complete information. If we have further questions or see that there is missing information from the prior year, we will call you.

It is our goal to have your tax return completed within 15 days of drop off. Although there may be instances that we cannot meet that timeline.

Person dropping off Tax Information:

Printed Name \_\_\_\_\_

Signature \_\_\_\_\_

## Drop Off Form

### Demographics

Did you get married or divorced last year?    Yes    No    Which? \_\_\_\_\_

Your Name \_\_\_\_\_ Spouse \_\_\_\_\_

DOB \_\_\_\_\_ DOB \_\_\_\_\_

SSN \_\_\_\_\_ SSN \_\_\_\_\_

Address \_\_\_\_\_

Is this a new address?    Yes    No

Please provide Phone numbers that you can be reached at:

Yours:                      Spouse:  
Home \_\_\_\_\_  
Cell \_\_\_\_\_              Cell \_\_\_\_\_  
Work \_\_\_\_\_              Work \_\_\_\_\_

### Dependents:

Did you Adopt, have a child born last year, or claiming a relative? Please list information.

Legal Name	SSN	DOB
_____	_____	_____
_____	_____	_____

### Employment

Have you changed Employers?    Yes    No

New Employment Information

You:	Date Started	Occupation
_____	_____	_____
Spouse:	Date Started	Occupation
_____	_____	_____

Are you self employed?    Yes    No

What information are your dropping off today. Please note # of forms next to form type.

W-2	_____	1099 Div	_____	Tithing	_____
1099R	_____	1099 S	_____	Donations	_____
1099 Misc	_____	1099 C	_____	Mileage	_____
1098	_____	1099 G	_____	Sales Tax	_____
1098 T	_____	1099 SSA	_____	Home Office	_____
K-1	_____	1099 Int	_____	Check Stub	_____
1099 B	_____			Bank Stmt	_____

Additional Information or Notes:

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