



## 2024 – TAX RETURN DROP-OFF INFORMATION FORM

Print Name \_\_\_\_\_ Signature \_\_\_\_\_

Email Address (Prefer to receive emails ) \_\_\_\_\_ Secondary Email Address \_\_\_\_\_

Primary Phone # (Prefer to receive calls ) \_\_\_\_\_ Secondary Phone # \_\_\_\_\_

- |   | <u>Yes</u>               | <u>No</u>                |
|---|--------------------------|--------------------------|
| <b>1) Did anyone listed on your return (you, spouse, dependents) use the <u>Government Marketplace</u> for health insurance during 2024?</b><br>If yes, you must provide us with <b>Form 1095-A</b> .                         | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>2) Are you dropping off tax documents for additional parties (i.e. parents, a child, In-laws, etc.) that will require a separate tax return to be filed?</b><br>If yes, please list their names below:<br>_____<br>_____   | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>3) Did your marital status change during 2024?</b><br>If yes, explain: _____   | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>4) Did you move during 2024? If so, please provide your new address and date of move</b> _____<br>_____  | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>5) Are you claiming any dependents for 2024? If no, skip to question #6. If yes, complete A, B and C.</b>  | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>A) Is there any change to the status of any dependents?</b><br>If yes, explain: _____<br><small>If you are adding a new dependent, please provide a <u>copy</u> of the birth certificate and social security card.</small> | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>B) Did all dependents live with you for more than half of 2024?</b><br>If no, explain: _____   | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>C) Did you provide over half the support for all your dependents?</b><br>If no, explain: _____   | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Can another person qualify to claim any of your dependents?</b><br>If yes, explain: _____  | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>E) Did you pay anyone for childcare services?</b><br>If yes, please provide receipt with <b>amount, EIN/SSN and address</b> .  | <input type="checkbox"/> | <input type="checkbox"/> |

6) If you receive a refund, would you like a direct deposit? Yes  No   
 Banking information **DID NOT** change   
 If your banking information **changed**, please provide the following:  
 Bank Name: \_\_\_\_\_  
 Routing Number: \_\_\_\_\_  
 Account Number: \_\_\_\_\_  
 Account Type (Checking or Savings): \_\_\_\_\_

7) Are you claiming an education credit? If yes, you must provide us with the Form 1098-T, Tuition Statement from the educational institution and the student's account statement from the college showing the payments made.

8) At any time during 2024, did you: (a) receive cryptocurrency as a reward, award, or compensation; or (b) sell, exchange, gift, or otherwise dispose of a digital asset (such as bitcoin), Foreign Assets or Foreign income?

9) Did you make any contributions to an IRA/HSA/529 Plan?

10) Did you make qualifying energy-efficient improvements to your home, which may include items such as windows, solar panels, water heaters, or furnaces?    
 If yes, please provide invoice(s) with make, model, and amount paid

11) Did you purchase an electric vehicle?

12) Did you receive income from renting a house or property?

13) Did you receive income from self-employment?

14) Did you receive a 1099-K from eBay, etc. related to selling property online?

15) If you made estimated tax payments for 2024, please provide the dates and amounts paid below.

FEDERAL <small>(Date/Amount)</small>	STATE <small>(Date/Amount)</small>	LOCAL <small>(Date/Amount)</small>
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____
4. _____	4. _____	4. _____

16) Please provide any significant changes that we should be aware of for 2025:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Preferred method to communicate your return is ready for pick up:

Call  Email

Preferred method of pick up:  PICK UP  MAIL  ELECTRONIC COPY