

**Returning Customer Drop Off Form** Date: \_\_\_\_\_ Preparer: \_\_\_\_\_

**Taxpayer & Spouse Names:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone #:** \_\_\_\_\_ **Text ok?** Yes No

**Email:** \_\_\_\_\_

- |   |                      |    |
|---|----------------------|----|
| Did you have any <b>new children</b> in 2023?                             | Yes                  | No |
| Did you collect state <b>unemployment</b> ?                               | Yes                  | No |
| Did you <b>move, buy</b> or <b>sell</b> a home in 2023?                   | Yes                  | No |
| -If you <b>rent</b> how much do you pay annually? _____                   | heat included? _____ |    |
| Did you buy or sell any <b>virtual currency (crypto)</b> ?                | Yes                  | No |
| Did you take any distributions from an <b>HSA</b> ? (Health Savings Acct) | Yes                  | No |
| Did you pay any <b>Daycare/Private School/529/College Tuition</b> ?       | Yes                  | No |
| Did you have <b>Health Insurance</b> through <b>Marketplace</b> ?         | Yes                  | No |
| Do you own any <b>rental properties</b> or <b>small businesses</b> ?      | Yes                  | No |
| Did you take any money out of an <b>IRA, 401K, retirement fund</b> ?      | Yes                  | No |

**IF YOU ANSWERED YES TO ANY OF THE ABOVE, MAKE SURE TO INCLUDE INFO IN NOTES AND DOCUMENTS WITH RETURN**

**PLEASE MAKE SURE TO CONFIRM BANK INFO OR YOU MAY NOT RECEIVE YOUR REFUND**

**Bank:** \_\_\_\_\_ **checking** \_\_\_ **savings** \_\_\_

**Routing:** \_\_\_\_\_ **Acct:** \_\_\_\_\_

Notes/Questions for Preparer:

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**Make sure to include the following if applicable:**

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|---|---|
| <input type="checkbox"/> W2 (Wages)                                   | <input type="checkbox"/> 1099G (Unemployment)             |
| <input type="checkbox"/> 1099R (Retirement)                           | <input type="checkbox"/> Mortgage Interest/Property Taxes |
| <input type="checkbox"/> 1099SSA (Social Security)                    | <input type="checkbox"/> 1098T (Tuition Expenses)         |
| <input type="checkbox"/> 1099B (Stock Sales/Investments)              | <input type="checkbox"/> 1095A (Marketplace Ins)          |
| <input type="checkbox"/> Crypto                                       | <input type="checkbox"/> 1098E (Student Loan Int)         |
| <input type="checkbox"/> 1099INT or 1099DIV (Bank Interest/Dividends) | <input type="checkbox"/> Daycare Expenses                 |
| <input type="checkbox"/> 1099MISC (Self Employment)                   | <input type="checkbox"/> 1099SA (HSA Dist)                |