

Returning Customer Drop Off Form Date: _____ Preparer: _____

Taxpayer & Spouse Names: _____

Address: _____

Phone #: _____ **Text ok?** Yes No

Email: _____

- | | | |
|---|-----|----|
| Did you have any new children in 2022? | Yes | No |
| Did you collect state unemployment ? | Yes | No |
| Did you move, buy or sell a home in 2022? | Yes | No |
| -If you rent how much do you pay annually? _____ | | |
| Did you buy or sell any virtual currency ? | Yes | No |
| Did you take any distributions from an HSA ? (Health Savings Acct) | Yes | No |
| Did you pay any Daycare/Private School/529/College Tuition ? | Yes | No |
| Did you have Health Insurance through Marketplace ? | Yes | No |
| Do you own any rental properties or small businesses ? | Yes | No |
| Did you take any money out of an IRA, 401K, retirement fund ? | Yes | No |

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

Bank: _____

Routing: _____ **Acct:** _____

Notes/Questions for Preparer:

Make sure to include the following if applicable:

- | | |
|---|---|
| <input type="checkbox"/> W2 (Wages) | <input type="checkbox"/> Mortgage Interest/Property Taxes |
| <input type="checkbox"/> 1099R (Retirement) | <input type="checkbox"/> 1098T (Tuition Expenses) |
| <input type="checkbox"/> 1099SSA (Social Security) | <input type="checkbox"/> 1095A (Marketplace Ins) |
| <input type="checkbox"/> 1099B (Stock Sales/Investments) | <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) |
| <input type="checkbox"/> 1099G (Unemployment) | |