

2022 New Customer Drop Off

Date: _____

Preparer: _____

Filing Status

Single	Married	Head of Household	Widow	Married Filing Separate
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Taxpayer:

Name:	Birthdate:
SSN:	Phone: Text ok? Y N
Email:	

Spouse:

Name:	Birthdate:
SSN:	Phone: Text ok? Y N
Email:	

Address: _____Do you **rent** or **own**? If rent, how much do you pay **annually**? _____

If you own, did you include mortgage interest and property taxes? Yes No

Bank: Do you normally get a refund? Yes No

Bank Name: _____

Routing #: _____

Account #: _____

Dependents:

Name	SSN	DOB
Name	SSN	DOB
Name	SSN	DOB
Name	SSN	DOB

Did you collect state **unemployment**? Yes NoDid you **buy** or **sell a home** in 2022? Yes NoDid you buy or sell any **virtual currency**? Yes NoDid you take any distributions from an **HSA**? (Health Savings Acct) Yes NoDid you pay any **Daycare/Private School/529/College Tuition**? Yes NoDid you have **Health Insurance** through **Marketplace**? Yes NoDo you own any **rental properties** or **small businesses**? Yes NoDid you take any money out of an **IRA, 401K, retirement fund**? Yes No**Notes:** _____
