

## 2019 Tax Year DROP-OFF CHECKLIST

*Name:	Spouse Name:					
*Phone Number:	Spouse Phone Number:					
Preferred Contact Method	: Email Pho	one				
Email:	Spouse Email:					
What date would you like fo	or your return to	be ready?				
Tax Return Pick Up Method:	Follow-up Appoint	ment with Prepare	er Pick up in Off	fice		
Do you have a preferred Ta	x Professional?	(if yes, please pro	vide name):			
CLIENT INFORMA	TION (Previ	ous clients - o	enter any CHAN	ISES from last ye	ear):	
Physical Address:	····			Date Moved:		
City, State, Zip:	<del></del>				<del></del>	
Marital Status: Single						
Date of Birth:		S	pouse Date of Birt	:h:		
SSN# or ITIN:	Spouse SSN# or ITIN:					
Can you be claimed as a dep	endent by someo	ne else? Y N_				
Are you an active member or	the spouse/deper	ndent of an active	member of the milita	ary? Y N		
DEPENDENTS* (or person liv	ing in your household)					
Name	Relationship	Date of Birth	SSN# or ITIN	Full-Time Student	Disabled?	
* If any dependents listed did not professional. This is critical to he						
Refund Method Preferred:	Check mailed to	home Pick	up check Dire	ct Deposit		
If Direct Deposit selected, en	ter current accoun	t information (if c	hanged from last y	ear):		
Routing Number:	Acc	count Number:		_ Checking Savir	ngs	
Are you interested in the Pi *additional fees of \$39-\$59 w		en out of the refu	nd, if applicable?	Y N		



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Drop Off	Date:		
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Income: (Check all that apply & include documents)		Expenses: (Check all that apply & include documents)			
Employer (W-2) Self-Employment* Interest (1099-Int) Social Security (SSA-1099) Retirement plan distribution* (1099-R) Dividends (1099-Div) Rental Property* Stock or Mutual Fund sale (1099-B) Unemployment		Self-Employment*Un-reimbursed by employerEducationRental Property*Medical/Dental CareUnion Dues			
Credits & Deductions: (Check all that apply & include documents)		Health Insurance: (Check all that apply & include documents)			
Donate cash or goods to a charity? Pay Student Loan interest? Pay Child/Dependent Care expense? Have a Mortgage Payment (1098) Make an IRA Contribution? Make a major taxable purchase? Pay Property Taxes? Make an HSA Contribution?		Were you or any members of your household: Covered by a qualified employer, private or government health insurance plan? Enrolled in a health insurance plan through the federal or state marketplace?			
Miscellaneous: (Check all that apply & include documents)  Sell a home? Pay/Receive alimony? Adopt a child? Suffer catastrophic loss? Have gambling winnings/losses? Change in marital status?	Pro	nis applies, we recommend you meet with your Tax fessional to discuss your tax situation before your return is prepared.			
TELL US ABOUT YOUR YEAR:  We want to find as many credits & deductions that we can. Here are some examples Bought property. Installed energy efficient windows. Had a child. Also include any details on address changes and dates moved, new children, etc.					