

Drop-Off

1. Gather your documents and complete the drop off form.
2. Find a convenient location and drop off at the front desk.
3. View and approve your taxes and we'll file your return.



Tax Pro Selection:

- First Available
- Specific Tax Pro: _____



Date of Drop-Off:

1 Primary Taxpayer

Full Name

Social Security # / ITIN

Date of Birth

Street Address

City

State

ZIP

Email

Phone #

Follow-up method

- Secure Messenger Phone

Occupation(s)

Marital Status? Single Married Widowed

Are you active in the military? Yes No

Is anyone claiming you as a dependent? Yes No

Would you like to designate \$3 to the Presidential Election Campaign Fund? Yes No

2 Your Spouse

Full Name

Social Security # / ITIN

Date of Birth

Street Address

City

State

ZIP

Email

Phone #

Follow-up method

- Secure Messenger Phone

Occupation(s)

Are you active in the military? Yes No

Is anyone claiming you as a dependent? Yes No

Would you like to designate \$3 to the Presidential Election Campaign Fund? Yes No

3 Dependents

If any dependents listed did not live at the primary taxpayer's address the entire year, please discuss this with your tax professional.

Name	Relationship	DOB	SSN / ITIN	Full-Time Student?	Disabled?
_____	_____	_____	_____	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
_____	_____	_____	_____	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
_____	_____	_____	_____	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

4 Your Year

Please list any events from the prior year that could affect your taxes.

ex.: bought property, had a child, installed energy efficient windows, etc.

Four horizontal lines for listing events.

5 Your Tax Situation

Please select all that apply to you or your spouse:

Income Sources

- Income Sources: Employer (W-2), Unemployment, Social Security (SSA-1099), Retirement plan distribution, Interest (1099-Int), Dividends (1099-Div), Stock or mutual fund sale (1099-B), Self-employment / miscellaneous income, Expenses from self-employment, Rental property.

Itemizations

- Itemizations: Donated cash or goods to a charity, Made a major taxable purchase, Had a mortgage payment (1098), Paid property taxes, Large out-of-pocket medical expenses.

Household / Dependents

- Household / Dependents: Changed family or marital status, Adopted a child, Paid child / dependent care expenses, Tuition (1098-T) and education expenses, Paid student loan interest, Enrolled in a health insurance plan through the federal or state marketplace (1095-A), HSA contribution.

Miscellaneous

- Miscellaneous: Sold a home, Paid / received alimony, Lived in a federally declared disaster area, Had gambling winning / losses, Made an IRA contribution, Had foreign income / assets / accounts, Received an IRS-issued PIN number.

PIN # [Redacted]

TAX PROFESSIONAL OR CSP: COMPLETE THE SECTION BELOW.

Form with fields for Taxpayer ID Type, Spouse ID Type, Taxpayer ID Number, Spouse ID Number, Place of issuance, Date of issuance, and checkboxes for Privacy Policy, CSA, RT, Consent to Use, and ENTERED INTO WORKCENTER.

Form with fields for How will the client review their return? (Approve Online, Return to Office) and Appointment Date.