



## New Client Drop off

Taxpayer \_\_\_\_\_ Social security # \_\_\_\_\_

Occupation \_\_\_\_\_ Birthdate \_\_\_\_\_

Spouse \_\_\_\_\_ Social security # \_\_\_\_\_

Occupation \_\_\_\_\_ Birthdate \_\_\_\_\_

Phone number \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

### Dependents: If more than 2 use back of form:

Name \_\_\_\_\_ BD / / SS# \_\_\_\_\_

Name \_\_\_\_\_ BD / / SS# \_\_\_\_\_

1. In 2022, did you receive Advance Child Tax Credit payments? If yes, enter total amount \$ \_\_\_\_\_

2. Childcare: Name \_\_\_\_\_ Address \_\_\_\_\_ Tax ID/SS# \_\_\_\_\_

### 3. List Number of W2's \_\_\_\_\_ Number of 1099-Misc, 1099-NEC, 1099-K \_\_\_\_\_

#### Other info:

	Yes	No	Include form
Do you own your home?	<input type="checkbox"/>	<input type="checkbox"/>	1098-Mort
Do you have rental property?	<input type="checkbox"/>	<input type="checkbox"/>	Rental expenses
Did you or dependent(s) attend college?	<input type="checkbox"/>	<input type="checkbox"/>	1098-T
Any charitable contributions?	<input type="checkbox"/>	<input type="checkbox"/>	Amt. \$ _____
Did you receive unemployment?	<input type="checkbox"/>	<input type="checkbox"/>	1099-G
Did you receive SSI benefits?	<input type="checkbox"/>	<input type="checkbox"/>	1099-SSA
Withdraw from 401K Retirement income?	<input type="checkbox"/>	<input type="checkbox"/>	1099-R
Union Dues	<input type="checkbox"/>	<input type="checkbox"/>	Amt. \$ _____ Local _____

List total amounts for job expenses (For State purposes only): Uniforms, boots, tools, supplies, equipment, memberships, License, recertifications, outer wear, sanitizers, gloves, etc.

\_\_\_\_\_

List any college/university expenses: Books, supplies, registration fees, computers/laptops, printers, etc.

\_\_\_\_\_

Refund:  Direct Dep RT \_\_\_\_\_ Acct. \_\_\_\_\_  Prepaid Card  Check (fee)

4. How will you pay your tax prep fee?  Fee withheld from refund (fee \$59.90)  Pay office directly (No Fees)