

Drop off date: \_\_\_\_\_

Pick Up date: \_\_\_\_\_

Federal \_\_\_\_\_

State \_\_\_\_\_

Local \_\_\_\_\_

### Returning Client

Taxpayer \_\_\_\_\_ Contact Phone \_\_\_\_\_

Email **Updated** \_\_\_\_\_

Driver's License if needs **Updated** \_\_\_\_\_

Bank Account if **Updated** \_\_\_\_\_

**DID YOU:**

Move: New Address \_\_\_\_\_ Date of Move \_\_\_\_\_

Change in Occupation \_\_\_\_\_ If yes \_\_\_\_\_

Change in Health Insurance \_\_\_\_\_ if Yes \_\_\_\_\_

**Dependent Form** for each a dependent form must be on file.

Add new dependents \_\_\_\_\_ Relationship: \_\_\_\_\_

Did dependent live with you?

Remove current dependent \_\_\_\_\_ Who/reason? \_\_\_\_\_

Did you marry or divorce? \_\_\_\_\_ Date \_\_\_\_\_

Was a new social security card required?

Were Children involved \_\_\_\_\_ if yes are you the custodial parent?

Make Charitable contributions?

***Attach Proof for any item above answered YES.***

**Would you like to:**

Direct Deposit if refund

Auto-Debit if Balance due \_\_\_\_\_ Auto debit date will be last date of tax season

Designate \$3 to Presidential election campaign fund

(does not affect your refund or balance due)

**I would like to receive:**

- a printed copy of my tax return and supporting documents.
- a digital copy of my tax return and supporting documents via encrypted email.
- a digital copy of my tax return and supporting documents on a thumb drive provided by me.
- a printed copy of my tax return and supporting documents by snail-mail for \$10 or cost.
- I do not want a copy of my tax return in any format above.

**I am solely responsible for the accuracy of the data that I provide. I understand that my return will be prepared based on the information I provide; and I will be charged an additional fee if changes have to be made to my return.**

**I understand all forms must be signed before my tax returns are efiled.**

**I will keep my copy of my tax return in a safe place and understand a fee of \$10 will be charged for a duplicate copy. NO PIN #'s or AGI's will be given out without the paid fee. Do not send any attachments via email, they will not be opened. All forms must be uploaded to the Secure Portal and must be in PDF format only.**

Signature: \_\_\_\_\_ (REQUIRED)

