

Office Use Only:  
IN \_\_\_\_\_  
DE \_\_\_\_\_  
W2 Summary \_\_\_\_\_  
1099R Summary \_\_\_\_\_

## 2023 Tax Return Drop Off Information Sheet

WOULD YOU LIKE A CALL TO DISCUSS ANYTHING IN MORE DETAIL? Y / N  
Ph. (Home): \_\_\_\_\_ Ph (Cell): \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_

Spouse: \_\_\_\_\_

Any changes in address, occupation, marital status, or dependents? Y / N

New Address: \_\_\_\_\_

Date Moved: \_\_\_\_\_ New Marital Status: \_\_\_\_\_

New Occupation: TP \_\_\_\_\_ SP \_\_\_\_\_

Circle: New Dependent or Dependent no longer on your tax return

Name: \_\_\_\_\_ SSN \_\_\_\_\_ BD \_\_\_\_\_

**IF YOU HAVE A REFUND, DO YOU WANT DIRECT DEPOSIT: Y / N**

Same banking as last year? Y / N Checking \_\_\_\_\_ Savings \_\_\_\_\_

ATTACH VOIDED CHECK OR COPY OF SAVINGS CARD

If not available, please enter info below

Bank: \_\_\_\_\_ RTN \_\_\_\_\_ Acct # \_\_\_\_\_

**DO YOU HAVE ANY EMPLOYEE BUSINESS EXPENSES? Y / N**

List amount and what item it applies to and if it is for TP or Spouse: **Union dues, uniforms, tools, supplies, protective clothing, mileage, required cellphone expense, internet, etc.**

In addition to cost of uniforms do you want to deduct \$400 for washing them? Y / N

**Have you included all sources of income?** for example, wages, unemployment, self-employment, social security, gambling, interest, dividends, investment sales, distributions from pensions, IRAs, annuities, rent, Form 1099-K, miscellaneous income, etc. Y / N

**Education expenses for you or your dependent?** (must include Form 1098-T) Y / N

Books and supplies \$ \_\_\_\_\_

**Student loan interest?** \$ \_\_\_\_\_ or include Form 1098-E Y / N

**Daycare expenses for dependent?** (include provider statement) **Y / N**

**Do you have any qualified home improvements for the energy credit?** **Y / N**

Examples are windows, doors, insulation, heat pumps, furnaces and boilers, hot water heaters, central air, biomass stoves, home energy audit, solar or geothermal systems. Roofs are not included this year. Attach receipt

**Did you purchase an electric vehicle?** **Y / N**

Attach the bill of sale.

**Was your health insurance obtained through Pennie.com?** **Y / N**

If yes, then we need Form 1095-A to complete your tax return.

**Do you have any bank accounts or investments held directly in a foreign country?**

**Y / N**      Value \$ \_\_\_\_\_

**At any time during 2023**, did you: (a) receive as a reward, award or payment for property or services; or (b) sell, exchange, gift, or otherwise dispose of a **digital asset** (or a financial interest in a **digital asset**)? e.g., **Bitcoin, Ethereum, NFTs** **Y / N**

**If you make Quarterly estimates list the amounts and dates paid.**

**Traditional Ira or Roth IRA contributions for 2023** (not what you do at work)

TP \$ \_\_\_\_\_ Spouse \$ \_\_\_\_\_ Traditional or Roth?

**529 Plan contributions for 2023?** List contributor, child, and amount.

**Do you want us to do your Property Tax/Rent Rebate if you qualify?** **Y / N**

Please include paid property tax receipts for March and July of 2023 or amounts paid for rent.

**Do you owe any unpaid sales tax for internet purchases?** **Y / N**

If yes, total of untaxed purchases requiring sales tax. \$ \_\_\_\_\_

