

Office Use Only:
IN _____
DE _____
W2 Summary _____
1099R Summary _____

2024 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 and Form 15400 if it applies.

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 2024, 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 2024 (not what you do at work)

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

529 Plan contributions for 2024? 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 2024 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. \$ _____

