

Returning Client Drop Off Information

Name _____ Date _____

Phone Number (____) _____ Email _____

Monthly Rent Amt Pd \$ _____ Heat: Incl ___ Not Incl ___ Months rented in '24 _____

Do you own a house? Yes ___ No ___ (Include property tax bill paid in 2024)

Any change in Bank Information? Yes ___ No ___

Any change in Address? Yes ___ No ___ (Please list any changes below)

Any change in dependents for 2024? Yes ___ No ___

-ADD- Name _____ DOB _____ SSN _____

-Remove _____

Any Charity donations? Cash/Check _____ Goods _____ QCD's _____

Did anyone attend a post-secondary (College) during 2024? (1098-T) Yes ___ No ___

If yes, How many years of College did the student complete? _____

(If yes, please provide 1098-T from the school.)

Was anyone enrolled in a private grade or high school during 2024? Yes ___ No ___

(If yes, please provide a statement of paid tuition from the school.)

Did you pay health insurance NOT PROVIDED by an EMPLOYER in 2024? Yes ___ No ___

If so, how much? _____

Any Student Loan interest paid in 2024? (1098-E) Yes ___ No ___

Did you receive a 1095A for Marketplace health coverage in 2024? Yes ___ No ___

Do you have a Health Savings Account? Yes ___ No ___ (Need 1099-SA) W-2 Box 12 code W

Any cryptocurrency transactions in 2024? (ex. Bitcoin) Yes ___ No ___

Any out of state income? Yes ___ No ___

Any Unemployment Income(1099G)? Yes ___ No ___

Any Investments accounts? (Include 1099-B or 1099-DIV) Yes ___ No ___

Any Energy Efficient Home Improvements? Yes ___ No ___ (Include Receipts)

New windows _____, Doors _____, or Insulation cost _____

Furnace _____, Central air _____, or Water heater cost _____

Please list any change of the basic information from last year's tax return:
