

# Returning Customer Drop off Form

Please review the below information and update any sections if necessary for the tax year of **2023**

**1. Required:** Phone Number

Cell: \_\_\_\_\_

Home: \_\_\_\_\_

**2. If there are no changes** on anything listed on this form from the prior year, please check here \_\_\_\_\_

**3. Email Address:** \_\_\_\_\_

**4. Current home address:**

\_\_\_\_\_  
\_\_\_\_\_

**5. Filing status** (CIRCLE ONE) ... If you do not know your filing status leave blank

**Single   Married Filing Jointly   Head of Household   Married filing Separately**

**6. Can you be claimed as a dependent on another person's return?** You cannot be claimed if you lived alone and/or financially supported yourself all year, are over the age of 18 and are not in college.

\_\_\_\_\_

**7.** If you want direct deposit for your refund and the information is the same as last year, check here: \_\_\_\_\_ Otherwise, put account information below:

**Routing** \_\_\_\_\_ **Account** \_\_\_\_\_

**8. Dependents to claim.** Any new dependents in 2023 provide name, date of birth, and social security number. If you have claimed them in the past and you are a returning client, first and last name of dependents is **required**.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**9.** If you would like our tax prep fees taken out of your refund there is a bank fee of \$116.95. Check here if you would like to opt for this option. \_\_\_\_\_

**10.** Did you receive any unemployment compensation in 2023? \_\_\_\_\_

### 11.Mortgage and Rent 2023:

**Rented: \*\*If you rented at multiple locations, list all (include how many months at each).**

## Address

Landlord name and address

Months rented in 2023 \_\_\_\_\_

**Monthly rent paid in 2023**\_\_\_\_\_

**Mortgage: \*\*If you paid mortgage on multiple homes, list all.**

Address \_\_\_\_\_

**How many months lived here in 2023** \_\_\_\_\_

**12.** If you have any notes, questions, or updates not mentioned above please write them here.

[illegible]