

Are you a new customer? _____

(Please provide a copy of your driver's license) you can text a picture to us too. Our number is 260-245-3880

Your date of birth _____

If you are married- what is your spouse's date of birth? _____

Phone number: _____

Do you text on this number? _____

Email address: _____

What is your current home address?

Circle your filing status: (choose only one)

Single

Married Filing Jointly

Head of Household

Married Filing Separately

Name and date of birth of the dependents you are claiming: (only children)

If you want direct deposit for your refund-provide routing and account number:

Routing: _____

Account: _____

Or same as last year
check here _____

If you take our fees out of your refund the bank charges you an extra \$96.95 out of your refund.

If you want our fees taken out of your refund please check: _____

If you received the advance Child Tax Credit payments in 2021, keep an eye on your mailbox: The IRS will be sending a letter detailing how to account for the payments on 2021 taxes.

How much did you receive \$ _____

Did you receive the third stimulus check in 2021? (It was \$1400 per person- in March 2021)

If so, how much? \$ _____

Did you have a mortgage in 2021? _____

If do not have a mortgage and you rent – how many months did you pay rent in 2021? _____

How much was rent per month? _____

What is your landlords name and address you paid rent to in 2021?

Did you receive unemployment compensation in 2021? _____

Please put this form and your documents into the clear plastic bag (provided) then place the bag in the red drop off bin right inside the office door. Do not include any folders with your documents.

Allow 7-14 days from drop off to completion.

Pricing

Basic Return - \$139: Includes w2s, unemployment compensation, SSA, 1099, Interest income.

Premium Return - \$219: Includes self-employment, earned income credit and college credit.

Please write any notes: