

# New Customer Drop Off Form

Please see the receptionist or Amanda if you would like help filling out this form.

1. Taxpayer name \_\_\_\_\_

2. Taxpayer date of birth \_\_\_\_\_

3. Taxpayer address

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

4. Taxpayer social security number \_\_\_\_\_

5. Taxpayer job/occupation \_\_\_\_\_

**If married**

6. Spouse name \_\_\_\_\_

7. Spouse date of birth \_\_\_\_\_

8. Spouse social security number \_\_\_\_\_

9. Spouse job/occupation \_\_\_\_\_

10. Phone numbers

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

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

11. Email address \_\_\_\_\_

12 Filing status (CIRCLE ONE) if you do not know leave blank

**Single   Married filing jointly   Head of household   Married filing separately**

13. 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. \_\_\_\_\_

**14. Dependents.** Any children and family members being claimed. Full name, date of birth, and social security number required

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\*If you paid for any childcare expenses (example: daycare) please attach a yearly summary receipt from provider

**15. Mortgage and Rent 2022**

**Rented:**

Address

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Landlord name and address

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Months rented \_\_\_\_\_

Monthly rent paid \_\_\_\_\_

\* If you rented at multiple locations list all

**Mortgage:**

Address \_\_\_\_\_

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How many months lived here \_\_\_\_\_

\*If you paid mortgage on multiple homes list all

**16. Direct deposit**

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

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

**17. Did you have any unemployment compensation in 2022?** \_\_\_\_\_

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

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