

Returning Customer Drop off Form

Please review the below information and update any sections if necessary for the tax year of 2022

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 2022 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 \$96.95. Check here if you would like to opt for this option. _____

10. Did you receive any unemployment compensation in 2022? _____

11. Mortgage and Rent 2022:

Rented: **If you rented at multiple locations, list all.

Address

Landlord name and address

Months rented _____

Monthly rent paid _____

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

Address _____

How many months lived here _____

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