

# CONVENIENT TAX SERVICE

Drop Off Date: \_\_\_\_\_ Tax Year \_\_\_\_\_

## 1. Contact Info

Name: \_\_\_\_\_ Email Address: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ **Text? Y / N** Work Phone: \_\_\_\_\_

**IMPORTANT NOTICE: TAXPAYERS WHO ARE CLAIMING CHILDREN ON THEIR RETURN.** Due to enhanced reporting requirements, we are asking all taxpayers who are claiming **EARNED INCOME CREDIT, ADDITIONAL CHILD TAX CREDIT OR AMERICAN OPPORTUNITY CREDITS** for their children to bring in additional proof for their claim. Be sure to know what you need to bring in to file this year before you drop off. **SEE FORM 886-H-EIC, visit us online or call us.**

## Important Healthcare Info Needed:

The Affordable Care Act (ACA) requires a full year of "minimum essential coverage" for all taxpayers and their dependents.

### Please indicate your status:

>Coverage at your work (spouse's work if applicable): \_\_\_\_\_

>Medicare or State sponsored insurance \_\_\_\_\_

> **Insurance Marketplace:** \_\_\_\_\_ **(MUST HAVE 1095 A)**

## 2. Client Information (check one):

☐ Single

☐ Married  
joint

☐ Married Filing  
separate

☐ Head of  
Household

☐ Qualifying  
Widow(er)

Do you own \_\_\_\_\_ or rent \_\_\_\_\_?

### RENT

Rent paid for the year: \_\_\_\_\_ Was heat included? \_\_\_\_\_

Did you move during the year? **Y** **N**

### OWN (IF YOU ARE DROPPING OFF, PLEASE JUST ENCLOSE FORMS)

Real estate taxes paid: \_\_\_\_\_

Mortgage Interest Paid. **FORM 1098**

Home Equity? **Y** **N** If yes, provide FORM 1098

Do you have a second property? **Y** **N**

### DEDUCTIONS: (deduction subject to limitations)

Charitable Donations are separated into two categories:

**Cash/check donations** (eg: church donations, United Way)

**Non Cash Donations** (eg. donations of clothing, toys, etc. or donations or vehicles)

### Income (IF YOU ARE DROPPING OFF, PLEASE JUST ENCLOSE FORMS)

Did you include ALL of your W2 \_\_\_\_\_ **Y / N**

Do you receive unemployment? \_\_\_\_\_ **Y / N**

Did you have any bank interest? include 1099 INT \_\_\_\_\_ **Y / N**

Did you sell any stock during the year? \_\_\_\_\_ **Y / N**

Do you receive retirement money? Form 1099 R \_\_\_\_\_ **Y / N**

Do you receive social security? \_\_\_\_\_ **Y / N**

Did you have any dividends? Form 1099 DIV \_\_\_\_\_ **Y / N**

Other income: \_\_\_\_\_

### DEPENDENTS / EDUCATION CREDITS

Do you have dependents? \_\_\_\_\_ **Y / N**

Do not include info here. We will call you.

Did you, your spouse or dependents have education expenses? **FORM 1098 T** \_\_\_\_\_ **Y / N**

Book and expenses: \_\_\_\_\_

**Be sure to include FORM 1098 T.** The 1098 T may have been delivered to your student directly through their school portal or email.

**Cash/check donations \$** \_\_\_\_\_

**Noncash donations: \$** \_\_\_\_\_

If over \$500, you must include the donation receipt from the organization (Goodwill, Purple Heart) for each donation.

**Volunteer Mileage (total miles):** \_\_\_\_\_

For more information on charitable donations, see **Topic 506 - Charitable Contributions** or visit our website.

**Did you donate a car this year?** Please call our office for more information on larger donations

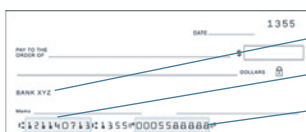
## 3. Bank Information

If you are getting a refund, we suggest that you have the money directly deposited into either your checking or savings account. Or, you can have your refund mailed, but it takes a little longer.

Please check one:

☐ Checking Account

☐ Savings Account



Bank Name: \_\_\_\_\_

Routing Number: \_\_\_\_\_ - OR -

Account Number: \_\_\_\_\_



☐ Please have my refund mailed to the address on my tax return.

**BE SURE TO DOUBLE CHECK YOUR ACCOUNT**

## 4. Signature

**Don't forget to pick and sign.** Even though your return is being process electronically, you must review the return and sign Form 8879 in our office. Payment for preparation is expected at time of pickup.

Office Notes: \_\_\_\_\_