

COLLINS ACCOUNTING & TAX SERVICE

TAX RETURN DROP OFF SHEET

Dependent Drop Off Form

Please review and complete this checklist, where applicable, in lieu of an appointment. Your extra effort in completing this form assists us to prepare your tax return efficiently and accurately. Your tax professional will contact you shortly to ask any additional questions required to complete your tax return. **Feel free to write any additional information or questions you might have at the end of this checklist.**

Please answer the following questions and attach all relevant documentation for tax year 2021:

- Is your dependent a citizen, national, or resident of the United States? YES NO
- Did your dependent(s) live with you for more than half of the year? YES NO
- Did you provide more than half the support for your dependent(s)? YES NO
- Could another person claim the dependent(s)? YES NO
- Did your dependent(s) earn income during the year? YES NO
 - If so, please indicate the name of the dependent(s) and total income earned _____
- Did you incur childcare expenses? YES NO
 - If yes, please provide a statement from the childcare provider with the Name, EIN, or SSN, address, and amount paid
- Did you and/or your spouse make any contributions to a 529 plan? YES NO
 - Amount of contribution (if statement is not attached): _____
- Did you receive any Advanced Child Tax Credit payments? YES NO
 - If yes, please provide a copy of Letter 6419 from the IRS.

Please complete the following for any new dependents in 2021 (please include copy of social security card):

Name _____ SSN _____
 Date of Birth _____ Relationship _____
 Name _____ SSN _____
 Date of Birth _____ Relationship _____

*If more than two, please enter additional information on the back of this sheet.

If you claim the Earned Income Credit, we must have 1 form of proof of residency per child

Please note that you may not claim the Child Tax Credit (CTC) or the Additional Child Tax Credit (ACTC) if your dependent did not live with you for more than half the year.