

COLLINS ACCOUNTING & TAX SERVICE

TAX RETURN 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 on the back of this sheet. If you have dependents, please complete the Dependent Drop Off Form.**

CLIENT NAME _____ SPOUSE'S NAME _____
NEW CLIENTS ONLY: CLIENT DOB _____ SPOUSE DOB _____

CURRENT PHONE NUMBER _____ BEST TIME TO CALL _____

ALTERNATE PHONE NUMBER (If applicable) _____

EMAIL ADDRESS _____

Is the address shown on last year's return still current? YES NO (If new client, provide a copy of last year tax return)
If no, enter current address: _____ Date moved to new address: _____

State of residence: _____ Did you live and work the entire year in this state? YES NO

If no, list other state(s): _____

Please answer the following questions and attach all relevant documentation for tax year 2021 (i.e. W-2s, 1098s, 1099s, K-1s, etc.):

- Has your filing status changed (e.g. got married, divorced, etc.)? YES NO
- Did you and/or your spouse receive a Form W-2 this year? YES NO
- Did you and/or your spouse receive any interest, dividends, or capital gains? YES NO
- Did you and/or your spouse receive any distributions from a retirement account? YES NO
- Did you and/or your spouse receive social security payments? YES NO
- Did you and/or your spouse receive income from self-employment? YES NO
- Did you and/or your spouse receive rental income? YES NO
- Did you and/or your spouse receive income from any other sources? YES NO
 - If yes, please explain: _____
- Are you claimed as a dependent on someone else's tax return? YES NO
- Are you a member of the military? YES NO
- Do you own a home? YES NO
- Did you, your spouse or your dependents have college tuition? YES NO
 - If yes, please attach copies of your Form 1098-T and details of out-of-pocket costs
- Did you and/or your spouse make any estimated tax payments? YES NO
- Did you and/or your spouse pay any student loan interest? YES NO
- Did you and/or your spouse have any unreimbursed educator expenses? YES NO
- Did you and/or your spouse have any charitable contributions? YES NO
- Did you and/or your spouse pay any unreimbursed medical expenses? YES NO
- Did you and/or your spouse contribute to an IRA or Roth IRA? YES NO
 - If yes, please indicate account type and amount contributed: _____
- Did you and/or your spouse have any other deductions or contributions? YES NO
 - If yes, please explain: _____
- Did you receive the Economic Impact Payment in 2021? YES NO
 - If yes, please provide a copy of Letter 6475

****If there is additional information or notes you would like to provide that is necessary in the preparation of your tax return, please include details on the back of this sheet.****

If you are entitled to federal and/or state refunds would you like to set up direct deposit YES NO

If yes, please attach a copy of a voided check or check the box below:

Direct Deposit information is the same as last year

By signing below, you are acknowledging that you have to the best of your knowledge, fully disclosed all necessary and accurate information for the preparation of your tax return(s) with the enclosed documents attached or written on this drop off form. If the information is not here, it will not be on your tax return and an amended return may be required at an additional fee plus any penalty and interest assessed by the IRS on the amended tax return.

Signed _____ Date ___/___/___