

# 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.**

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**Please answer the following questions and attach all relevant documentation for tax year 2022:**

- 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): \_\_\_\_\_

**Please complete the following for any new dependents in 2022 (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.\*\**