

TAXPERT Tax Service

Saving You Time & Money Since 1983

DROP OFF SHEET (PRIOR CLIENTS ONLY)

DATE: _____

CLIENT NAME: _____

PHONE NUMBER: _____

Mailed in _____

ALTERNATE NUMBER: _____

Faxed in _____

Email: _____

Preparer requested: _____ (if no preparer requested, a preparer will be assigned and will call you before beginning.)

Are there any new additions to the return, i.e. dependent, spouse? _____ If yes, please supply full name, DOB and SSN for each: _____

Additional notes: _____

DO NOT WRITE BELOW THIS LINE

RECEIVED BY: _____

DATE RECEIVED: _____

If mailed in or faxed in - Engagement letter faxed for signature(s) by: _____

PREPARER: _____

INITIAL CLIENT CALL - DATE/TIME: _____ / _____

NOTES: _____

	2020	2021		
<i>Did u receive Stimulus? Amount</i>			Y	N
<i>Do you have a foreign bank account or income</i>			Y	N
<i>Buy/trade/use virtual currency (Bitcoins)</i>			Y	N
<i>Unemployment Benefits</i>			Y	N
Has your marital status changed			Y	N
Any New Dependants			Y	N
Did you open a business this year			Y	N
Do you own rental Property			Y	N
Pension or any retirement income			Y	N
Social security income			Y	N
Interest from bank accounts			Y	N
Dividends			Y	N
Sale of Stock			Y	N
Do you have any gambling winnings			Y	N
Did you put in Solar or other energy property			Y	N
Did you get the homebuyer credit in 2008			Y	N
Anyone in college this year			Y	N
Do you have dependant care			Y	N
Alimony prior to 2019? Date _____			Y	N
Did you pay Student Loan Interest			Y	N
Do you get your health ins. thru the marketplace			Y	N
529 Contributions or distributions			Y	N
HSA Distributions			Y	N
Volunteer fire fighter			Y	N
Union dues			Y	N
Would you like to make an IRA Contribution			Y	N
Did you make any non cash charitable cont.			Y	N
Have you changed your bank account info.			Y	N
Did you pay Federal estimates			Y	N
Did you pay State estimates			Y	N
Did you get education assistance from employer?			Y	N

Notes:
