

Drop off Sheet

Name:

Telephone #:

--	--

Children or others whom you are claiming as dependents:

--	--	--	--

Drop off Questions

1. How much stimulus payment did you receive? First Payment _____ Second Payment _____
2. Any **Cash donations** (even if you don't itemize)? _____
3. Best time to call: _____
4. Has your address changed (Y/N)?
5. New address: _____
6. Email address: _____
7. Has your bank information changed (Y/N). If so, we need the new information, preferably a voided check.
8. Do you have any out-of-state purchases (clothing in MN etc.) that you did not pay sales tax on (Y/N)? If so how much?
9. Did you pay rent (Y/N). If so, how much per month? _____ For how many Months? _____
Was heat included (Y/N)
10. Did you or your children attend any secondary schooling (tech or college) (Y/N)? If So, we will need information regarding tuition, books, fees, grants and scholarships.
11. If you are between the ages of 18-24, are your parents claiming you (Y/N)?
12. Did you cash out any retirement accounts (Y/N)? If so, we will need the **1099R**.
13. Did you have any canceled debt (Y/N)? If so, we will need the **1099C** or **1099A**
14. Do you owe a payment to the first time home buyer credit (Y/N)? If so, how much? _____
15. If you qualify for homestead credit, please bring in the rent certificate(s).
16. Did you have any virtual currency transactions (Bitcoin Etc) (Y/N)?
17. Did you receive any unemployment (Y/N)? If so, we will need the **1099G**
18. Did you or your spouse renew your drivers license (Y/N)?

Taxpayer	Spouse
Issue Date:	Issue Date:
Expiration Date:	Expiration Date:

Insurance Questions

1. Did you use any money from your **HSA** (Y/N)? If so, we need the **1099-SA**
2. Did you contribute to an **HSA** (Y/N)? If so, we need the **5498-SA** Form
3. Do you have any supplemental Insurance (Y/N)? If so, how much?
4. Did you or your spouse have insurance through the marketplace (Y/N)? If so, you need the **1095A** form

Dependent Questions

Earned Income Credit (EIC), American Opportunity Tax Credit (AOTC), Child Tax Credit (CTC), and Additional Child Tax Credit (ACTC)

1. Number of Months the child(children) lived with you?
2. Did the child(children) live in the us with you over half the year (Y/N)?
3. Can anyone else claim the child(children) for EIC (Y/N)?
4. Can you provide documentation to substantiate eligibility for and the amount of the credit(s) claimed on the return if his/her return is selected for audit? (school records, medical records, or court papers) (Y/N)
5. Were any of these credits (EIC, AOTC, CTC, or ACTC) disallowed or reduced in a previous year (Y/N)?
6. Is there an active Form 8332, Release/Revocation of Claim to Exemption for Child by Custodial Parent, or a similar statement in place and, if applicable, did you attach it to the return (Y/N)?