



## CLIENT DROP-OFF INFORMATION

<b>Date Dropped Off:</b> _____	<b>Preparer:</b> _____
<b>Name:</b> _____	<b>SSN:</b> _____
<b>Name:</b> _____	<b>SSN:</b> _____
<b>Phone:</b> _____	<b>New Client:</b> <u>      YES      </u> <u>      NO      </u>
<b>Email:</b> _____	
<b>Have you had any significant changes in 2025 (Jobs, Retirement, Birth, Moved, etc)?</b> _____	

*	<b>Marital Status:</b>	<u>      Same      </u>	<b>Change:</b> _____
*	<b>Address:</b>	<u>      Same      </u>	<b>Change:</b> _____
*	<b>Dependents:</b>	<u>      Same      </u>	<b>Change:</b> _____

>	<b>Did you or anyone in your household have health insurance through the marketplace?</b>	<u>      YES      </u>	<u>      NO      </u>
>	<b>If you have a refund do you want your money deposited in the same account as last year?</b>	<u>      YES      </u>	<u>      NO      </u>
<b>For new Bank Account, attach Cancelled Check</b>			
>	<b>Did you or your spouse Renew your Drivers License?</b>	<u>      YES      </u>	<u>      NO      </u>
<b>If YES make a copy of Drivers License</b>			
>	<b>Did you have Childcare or Education expenses?</b>	<u>      YES      </u>	<u>      NO      </u>
>	<b>Have you Sold any items (House, Stocks...) this year?</b>	<u>      YES      </u>	<u>      NO      </u>
>	<b>Did you have any Home Improvements (Exterior Doors, HVAC, Windows, Insulation...)</b>	<u>      YES      </u>	<u>      NO      </u>
>	<b>Did you take any distributions from a 401K or IRA?</b>	<u>      YES      </u>	<u>      NO      </u>
>	<b>Did you make any contributions to an IRA this year?</b>	<u>      YES      </u>	<u>      NO      </u>
>	<b>Did you have overtime?</b>	<u>      YES      </u>	<u>      NO      </u>
>	<b>Did you earn tips?</b>	<u>      YES      </u>	<u>      NO      </u>

**IF YOU HAD ANY NEW DEPENDENTS OR ARE NEW TO RELIABLE TAX, PLEASE FILL OUT THE PERSONAL DATA PAGE.**

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