

TAX DROP OFF INFORMATION SHEET

Name(s): _____

Address: _____ CHECK IF CHANGE

Phone: _____ Email: _____

If address changed please provide dates at each residence.

REVIEW PRIOR YEAR TAX RETURN FOR THE FOLLOWING:

DEPENDENTS: Same NEW-Please provide Name, DOB & SSN

Remove: _____ (NAME(S))

College Students: _____ Form 1098T must be provided

BANK:

Did your bank CHANGE: ___ Yes ___ NO

If YES – attached new bank information

UNREIMBURSED EMPLOYEE EXPENSES (STATE AND LOCAL ONLY)

Initial here to verify you possess receipts and proof of deductions _____

PLEASE PROVIDE LIST WITH EXPENSE TOTALS – DO NOT INCLUDE RECEIPTS

IRA Contributions: _____ (Traditional/Roth) Circle one

Spouse IRA Contributions _____ (Traditional/Roth) Circle one

NEW FOR THIS YEAR:

- Child Tax Credit – if you were eligible you will receive a letter stating how much (if any) advance payments you received – you must include that with your documents
- Up to \$300 in Charitable contributions may be deducted even if you do not itemize – My Contributions are: \$ _____

Other Items you may need to enclose if applicable to you:

- W-2s (ensure your personal information is correct)
- 1099R(s) (distributions from IRAs, Pensions, Retirement Funds)
- Social Security Statement
- Unemployment Compensation (available via your UC login)

CONTINUED ON BACK



