FAST. ACCURATE. PROFESSIONAL
PLAZATAX ADVISORS
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2023 Tax Year DROP-OFF CHECKLIST

Drop Off Date:_____________

Name:___________________________________ Spouse Name:____________________________

Phone Number:___________________________ Spouse Phone Number:_____________________

Email:___________________________________ Spouse Email:____________________________

Preferred Contact Method: Text ___ Call ___ Email ___

Preferred Tax Professional: First Available ___ Specific Preparer: _________________________________

When would you like your tax return to be ready? Within 1 week ___ Within 2 weeks ___ No rush ___

How do you want to receive the summary of your tax return when it's done and ready for you to pick up?

Text message ___ Phone call/voicemail ___ Email___ Appointment with preparer ___

CLIENT INFORMATION

Previous clients: Any changes from last year? Y___ N___ (if yes, please enter changes below)

Physical Address:____ Date Moved:_____________

City, State, Zip:____

Marital Status: Single ___ Married ___ Widowed ___

Date of Birth: _____________________________ Spouse Date of Birth:___________________________

SSN# or ITIN:______________________________ Spouse SSN# or ITIN:___________________________

Can you be claimed as a dependent by someone else? Y___ N___

DEPENDENTS* (or person living in your household that you are eligible to claim)

Name	Relationship	Date of Birth	SSN# or ITIN	# of Months Lived With You	Full-Time Student?

* If any dependents listed did not live at the primary taxpayer's address the entire year, please discuss this with your tax professional. This is critical to help us help you accurately report your residency and dependency to the taxing authorities.

Refund Method Preferred: Check mailed to home___ Direct Deposit___ Debit Card* ___

If Direct Deposit selected, enter current account information**:**

Routing Number:___________________ Account Number:___________________ Checking___ Savings___

Are you interested in the Preparer Fees being taken out of the refund, if applicable? Y*___ N___
*additional $39 fee may apply

I certify the information I provided on this form is true and correct. I understand that any false statements or deliberate omissions may subject me to legal actions for fraudulent misrepresentation. X______________________________

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Drop Off Date:______________

Income:
(Check all that apply & include documents)

___Employer (W-2)
___Self-Employment (or 1099-NEC)*
___Unemployment (1099-G)
___Social Security (SSA-1099)
___Retirement plan distribution* (1099-R)
___Interest (1099-Int)
___Dividends (1099-Div)
___Stock or Mutual Fund sale (1099-B)
___Rental Property*

Expenses:
(Check all that apply & include documents)

___Self-Employment*
___Un-reimbursed by employer
___Education
___Medical/Dental Care
___Rental Property*

Credits & Deductions:
(Check all that apply & include documents)

___Donate cash or goods to a charity?
___Pay Student Loan interest?
___Pay Child/Dependent Care expense?
___Have a Mortgage Payment?
___Make an IRA Contribution?
___Make a major taxable purchase?
___Pay Property Taxes?
___Make an HSA Contribution?

Health Insurance:
(Check all that apply & include documents)

Were you or any members of your household:

___Covered by a qualified employer, private or other health insurance plan?

___Enrolled in a health insurance plan through Government marketplace/Healthcare.gov?

Miscellaneous:
(Check all that apply & include documents)

___Sell a home?
___Pay/Receive alimony?
___Adopt a child?
___Suffer catastrophic loss?
___Have gambling winnings/losses?
___Change in marital status?
___Have major home improvements?
___Purchase electric vehicle?
___Sell or use virtual currency (Bitcoin.)?

*** If this applies, we recommend you talk with your Tax Professional to discuss your tax situation before your tax return is prepared.**

TELL US ABOUT YOUR YEAR:

We want to find as many credits & deductions that we can. Here are some examples... Bought property. Installed energy efficient windows. Had a child. Also include any details on address changes and dates moved, new children, etc.

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