**NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ PHONE #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**EMAIL: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_DROP OFF DATE:\_\_\_\_\_\_\_\_\_\_\_**

* **HAS YOUR BANKING INFORMATION CHANGED? (Existing clients only) YES/NO**

**-If your banking info has changed, please provide a voided check.**

* **IF YOU ANTICIPATE A REFUND WOULD YOU LIKE IT DIRECTLY DEPOSITED INTO**

**YOUR ACCOUNT?**

**YES/NO**

**OR**

* **IF YOU OWE TAXES WOULD YOU LIKE IT WITHDRAWN DIRECTLY**

**FROM YOUR ACCOUNT?**

**YES/NO**

**PLEASE PROVIDE A VOIDED CHECK**

**PLEASE BE SURE TO INCLUDE:**

* **1095 A/B/C (Proof of Health Insurance)**
* **ALL W-2’S & 1099’S**
* **COLLEGE TUITION & STUDENT LOAN INTEREST STATEMENTS** 
  + **– 1098-T OR 1098-E**
* **BANK INTEREST STATEMENTS 1099-INT**
* **MORTGAGE STATEMENTS 1098-INT**
* **NEW HOME BUYER? SETTLEMENT SHEET**
* **DID YOU HAVE A NEW BABY? DOB & SOCIAL SECURITY NUMBER**
* **NAME AS IT APPEARS ON YOUR SOCIAL SECURITY CARD**