

DROP OFF/PAPERWORK SUBMISSION SLIP



If you have any self - employment /rental property/ additional states, besides AZ, you must make an appointment.

NAME: _____ PHONE: _____

Date: _____

Filing Status: Single _____ Married _____ Head of Household _____

1. What are you dropping off?

Number of W2's _____ Number of 1099 R's (retirement) _____

2. If during this year you had healthcare.gov medical insurance, we need form 1095A

3. For refunds, will you be doing direct deposit or paper check? _____

If direct deposit, please specify the last 4 digits of the bank account number for verification or submit new routing and account number if applicable

Acct # _____ Routing # _____ Checking ___ Savings ___

4. Was your driver's license new this year? Yes or No

If not, Is last year's copy still valid? Yes or No

(We will need copies of any NEW drivers' licenses.)

5. Who are we claiming as dependents? Clarify dependents between 17-24, are they full-time students? _____

6. Amount Received for Cares Act - Stimulus #1 _____

7. Amount Received for Economic Impact Payment - Stimulus #2 _____

Due to Federal & Arizona charity law changes, you can still benefit from charity deductions even if NOT itemizing.

Cash Donations: _____ Non-Cash Donations: _____

Special notes: _____