

## New Client Drop-Off Questionnaire

### Client Information

Taxpayer Full Name:	<input style="width: 95%;" type="text"/>
Spouse Full Name (if joint):	<input style="width: 95%;" type="text"/>
Phone:	<input style="width: 60%;" type="text"/>
Email:	<input style="width: 95%;" type="text"/>
Current Address:	<input style="width: 95%;" type="text"/>
City:	<input style="width: 70%;" type="text"/>
State:	<input style="width: 20%;" type="text"/>
ZIP:	<input style="width: 30%;" type="text"/>
Occupation (Taxpayer):	<input style="width: 80%;" type="text"/>
Occupation (Spouse):	<input style="width: 80%;" type="text"/>

### Dependents (if any)

List each dependent: Full name, DOB, relationship, months lived with you, and SSN/ITIN (if available).

### Income (check Yes/No)

W-2 wages	Yes	No
1099 contractor/gig income (1099-NEC/MISC)	Yes	No
Payment platform income (1099-K)	Yes	No
Retirement/pension distributions (1099-R)	Yes	No
Social Security benefits (SSA-1099)	Yes	No
Unemployment (1099-G)	Yes	No
Interest/dividends (1099-INT/DIV)	Yes	No
Stocks/crypto transactions (1099-B or exchange statements)	Yes	No
Rental income	Yes	No
Other income (describe on Page 2)	Yes	No

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### Deductions & Credits (check Yes/No)

Own a home / paid mortgage interest (Form 1098)	Yes	No
Paid property taxes (often included with mortgage)	Yes	No
Paid childcare expenses (include provider info)	Yes	No
Education expenses (1098-T)	Yes	No
Student loan interest (1098-E)	Yes	No
Contributed to an IRA	Yes	No
HSA contributions/distributions (1099-SA / 5498-SA)	Yes	No
Marketplace health insurance (1095-A)	Yes	No
Significant charitable donations	Yes	No
Significant medical expenses (if itemizing)	Yes	No

### Life Events & Changes

Married / divorced / separated this year	Yes	No
Moved this year	Yes	No
Bought or sold a home	Yes	No
Had a child or changes to dependents	Yes	No
Received IRS/State notices (attach letter)	Yes	No

Other income, explanations, or notes:

### Preferences

Preferred contact method:                      Call                      Text                      Email  
 Refund/payment preference:                      Direct deposit                      Paper check                      Debit/ACH payment

Signature:       Da

By signing, you confirm the information provided is complete and accurate to the best of your knowledge.