COPPER STATE TAX

Returning Client Drop-Off Questionnaire

Client Name:

Phone: Email:

Updates Since Last Year (check Yes/No)

Name, address, phone, or email changed	☐ Yes	☐ No
Marital status changed	☐ Yes	☐ No
Dependents changed (new child, custody, no longer claiming)	☐ Yes	☐ No
Bank info changed for direct deposit	☐ Yes	☐ No
Received IRS/State notices (attach letter)	☐ Yes	☐ No

If any YES, provide details:

Income Changes (check Yes/No)

New or additional W-2s	☐ Yes	☐ No
New 1099 contractor/gig income (1099-NEC/MISC)	☐ Yes	☐ No
Payment platform income (1099-K)	☐ Yes	☐ No
Retirement/pension/Social Security changes	☐ Yes	☐ No
Unemployment income (1099-G)	☐ Yes	☐ No
Investment/crypto activity (1099-B/exchange)	☐ Yes	☐ No
Rental property changes (new, sold, expenses)	☐ Yes	☐ No
Other income changes (explain)	☐ Yes	☐ No

Explain any changes (optional):

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Deductions & Credits (check Yes/No)

Bought/sold/refinanced a home	☐ Yes	☐ No
Significant mortgage interest/property tax changes	☐ Yes	☐ No
Childcare expenses	☐ Yes	☐ No
Education expenses (1098-T)	☐ Yes	☐ No
Student loan interest (1098-E)	☐ Yes	☐ No
IRA/HSA contributions or distributions	☐ Yes	☐ No
Marketplace health insurance (1095-A)	☐ Yes	☐ No
Large charitable donations or major medical expenses	☐ Yes	☐ No

Notes / Questions:

Direct Deposit (optional)

If your bank information changed, provide updated details:

Routing #: ____________ Acc ____________

Signature: ____________ Da ____________

By signing, you confirm the above updates are complete and you have included all tax documents available.