

Tax Drop Off Questionnaire 2024 (for 2023 returns)

Client Name: _____ Date _____

Phone #: _____ Email Address: _____

1) E-Filing Requirement: **Driver's License**

_____ Debbie prepared my taxes last year and there have been no renewals in the last year.

***New clients or returning clients with renewed licenses - please provide a copy of the front and back of your (and your spouse's) Driver's License.**

2) Have there been any changes since last year?

Address?

Marital Status?

Dependent Changes?

House Sale or Purchase?

Other changes?

3) Did you buy, sell or send any **Bitcoin** or other virtual currency in 2023?

_____ yes _____ no

4) If you are receiving a refund, do you want direct deposit of your refund? _____ yes _____ no

If it is definitely the same information used on last year's return, please write same: _____

If not, please indicate the information here:

_____ Checking _____ Savings Name of Bank: _____ Account #: _____

5) If you owe a tax bill, would you like to discuss paying by electronic withdrawal?

_____ yes _____ no

6) **For Homeowners:** Did you do anything to your home for the Energy Tax Credit in 2023?

(windows, doors, furnace, insulation, A/C, clean energy, electric panel upgrades)

_____ yes _____ no (If yes, I will contact you with the requirements to see if you qualify.)

7) Any additional information or questions that you have for me?

Client Signature