



Drop off Form

Are you a returning Peoples Tax Client? Y | N

If yes, do you have a preferred tax professional? (Please provide their name): _____

What date would you like for your return to be ready? _____

Client Information:

Marital Status:

Single | Married | Widowed

Primary Taxpayer Name: _____

Spouse Name: _____

Date of Birth: _____

Spouse Date of Birth: _____

SSN or ITIN: _____

Spouse SSN or ITIN: _____

Occupation: _____

Occupation: _____

Physical Address: _____

Physical Address (if different): _____

City, State, Zip: _____

Preferred Contact Method: Email | Phone

Best Phone Number: _____

Best Phone Number: _____

Email: _____

Email: _____

Driver's License #: _____

Driver's License #: _____

Date Issued: _____ State Issued: _____ Date Expired: _____

Date Issued: _____ State Issued: _____ Date Expired: _____

Dependents (or person living in your household)

Name	Relationship	Date of Birth	SSN or ITIN (new clients only)	Full-time Student?	Disabled?

Did all dependents live with the primary taxpayer all year? Yes | No

Check all items that apply and provide supporting documents

Taxpayer/Dependent Information

- Last year's tax return (new client)
- Social Security cards (new client)
- Social Security cards – new spouse/dependents
- Driver's license/ID (new client)
- Death of taxpayer/dependent

Income

- Form(s) W-2
- Interest Income (Form 1099-INT)
- Dividend Income (Form 1099-DIV)
- Prior year state refund amounts
- Alimony received
- Business Income and expenses
- Stock or personal asset sales
- Sale of a business or business assets
- IRA distributions (Form 1099-R)
- Pension/Annuity income (Form 1099-R)
- Rental property income and expenses
- Farm income and expenses
- Unemployment income (Form 1099-G)
- Social Security Benefits (Form 1099-SSA)
- Railroad Retirement (Form RRB-1099 (R))
- Gambling winnings/losses (Form W-2G)
- Miscellaneous Income (Form 1099-MISC)
- Refunds of amounts previously deducted
- Schedule K-1

Adjustments to Income

- Health Savings Account contribution
- Moving expenses (military personnel only)
- SEP, SIMPLE contributions
- Early withdrawal penalty on savings
- Health insurance paid for self-employed
- Alimony paid (amount & SSN of recipient)
- IRA contributions
- Student loan interest
- Classroom supplies (K-12)

Itemized Deductions

- Medical expenses (PAID)
 - After-tax insurance premiums
 - Hospital/Doctors/Dentists
 - Long-term insurance premiums
 - Prescriptions
 - Hearing aids/batteries
 - Eyeglasses/contacts/contact solution
 - Medical mileage
 - Marketplace Health Insurance
- Real estate taxes
- Personal property taxes
- Home mortgage interest (Form 1098)
- Charitable contributions (cash/check)
- Charitable contributions (noncash)
- Charitable mileage
- Casualty losses (Presidentially declared disaster areas)

Credits

- Child and dependent care expenses
- Education expenses
 - Forms 1098T - E - or 1099Q
- Residential energy expenses
- Adoption expenses

Taxes Paid

- Estimated taxes paid (federal and state)
- Extension payment

Misc. Items

- First-time homebuyer credit repayment
- Household employee information
- Tips received
- Sale or purchase of a personal residence
- HUD-1 statement - home purchase or refinance

Other Information: