

J & J TAXES AND MORE

DROP OFF FORM

PLEASE FILL OUT COMPLETELY!

	LEGAL NAME	*NEW CLIENTS* SOCIAL SECURITY NUMBER	*NEW CLIENTS* BIRTHDATE	PHONE NUMBER	EMAIL ADDRESS
TAXPAYER:					
SPOUSE:					
DEPENDENT:					ELIGIBLE TO CLAIM?
DEPENDENT:					YES/NO
DEPENDENT:					YES/NO
DEPENDENT:					YES/NO
DEPENDENT:					YES/NO

CURRENT ADDRESS: _____

BUY/SELL OR HOLD ANY VIRTUAL CURRENCY: YES/NO ANY FOREIGN ACCOUNTS: YES/NO

ANYTHING WE NEED TO BE AWARE OF?	ANY CHANGES FROM PREVIOUS YEAR?	USE BACK IF NECESSARY
_____	_____	_____
_____	_____	_____
_____	_____	_____

BANK INFORMATION :	ROUTING NUMBER	ACCOUNT NUMBER
DEBIT ANY BALANCE DUE? YES/NO	_____	_____

IF YOU BELIEVE OR HAVE A HISTORY OF HAVING A BALANCE DUE (OWING) WOULD YOU LIKE AN ESTIMATED PAYMENT BE MADE? YES / NO

DATE OF PAYMENT (BEFORE 4/15): _____ AMOUNT OF ESTIMATED: _____

PAPERWORK RECEIVED AFTER MARCH 20, MAY REQUIRE AN EXTENTION TO BE FILED.

WE WILL CONTACT YOU WHEN YOUR RETURN IS FINISHED AND READY FOR PICKUP!

PLEASE SIGN: _____ DATE: _____