

Drop Off Document Checklist

Today's Date _____

If client last yr., please put your name and SSN and update as needed. If a dependent was on your return last year and is not this year, please indicate this in dependent info. If no changes from last yr. check

Name: First _____ M.I. _____ Last _____

DOB (M/D/YR) _____ SSN _____ EIN _____

Address: _____

City: _____ ST _____ Zip _____

Home Phone: _____ Cell: _____ Work: _____

Email Address: _____ Occupation: _____

Are You Married? ___ Yes ___ No If yes, will you be filing jointly or separately? _____

Spouse Information

Spouse Name: First _____ M.I. _____ Last _____

DOB (M/D/YR) _____ SSN _____ Occupation: _____

Dependent Information

1 Name: First _____ Last _____ DOB (M/D/YR) _____

SSN _____ Relationship _____ Months lived with last yr. _____

2 Name: First _____ Last _____ DOB (M/D/YR) _____

SSN _____ Relationship _____ Months lived with last yr. _____

3 Name: First _____ Last _____ DOB (M/D/YR) _____

SSN _____ Relationship _____ Months lived with last yr. _____

4 Name: First _____ Last _____ DOB (M/D/YR) _____

SSN _____ Relationship _____ Months lived with last yr. _____

IMPORTANT! Please have all of your tax documents in an envelope when dropping them off.
The document checklist should be included. Include a voided check if you want direct deposit of refund.

Please check if you want to have your preparation fees deducted from your refund by doing a bank product. (Additional fees will apply)

Please check if you would like to apply for a refund advance of up to \$750.00

If you have any questions on this form, please call us at (865) 984-6329 for assistance.
To the best of my knowledge and belief the information provided to Accu-Tax of Maryville/Alcoa is true and correct.

Signature _____

Date (M/D/YR) _____

Drop Off Checklist

Documents to Include for Tax Preparation (Check items if applicable and provide supporting documents.):

- K1s (partnerships, investments S Corps. EtC)
- W-2 Wages
- W-2G Gambling Winnings 1097-BTC Bond Tax Credit
- 1095-A Marketplace health insurance
- 1095-B Health insurance Coverage
- 1095-C Employer provided health insurance
- 1098 Mortgage Interest
- 1098-C Contributions of Motor Vehicles, Boats and Airplanes
- 1098-E Student Loan Interest
- 1098-MA Homeowner Mortgage Payments
- 1098-T Qualified Tuition and Related Expenses
- 1099-A Acquisition or Abandonment of Property
- 1099-B Sales of Stock
- 1099-C Canceled Debt
- 1099-DIV Dividends
- 1099-G State/Local Refunds
- 1099-G Unemployment Compensation
- 1099-INT Interest Income
- 1099-K_Merchant_Card_and_Third_Party_Network_Payments
- 1099-LTC_Long_Term_Care_and_Accelerated_Death_Benefits
- 1099-MISC_Miscellaneous_Income
- 1099-OID_Original_Issued_Discount
- 1099-PATR-Patronage-Dividends
- 1099-Q_Qualified_Education_Programs
- 1099-R Distributions from IRAs and retirement accounts
- 1099-S Gross Proceeds from Real Estate Transactions
- 1099-SA Distributions from Health Savings Account._MSAs
- 1099-SSA Social Security Statement

Other Tax Documents

- Prior Year Tax Returns (If new client)
- Child and Dependent Care Information Amended Tax Return
- Settlement Sheets for Homes Sold/Purchased
- Rental Real Estate Information
- Stock and Bond Transactions
- Copies of IRS, State and Local Notices Received
- Medical & Dental Expenses
- Charitable Donations
- Employee Business expenses
- Business income and expenses if filing Sch. C small business

Other Items Included (Please indicate):