

Drop-off Checklist

*****For New Clients*** Please include copies of birth certificates and social security cards for all dependents, a copy of your Driver's License, and the previous year's tax return. On the outside of the envelope, please indicate "New Client" and the name of the person who referred you.**

Instructions for the Outside of the Envelope:

- List all names.
- Include the date you are submitting your documents.
- Provide your primary contact number (cell phone preferred).

Instructions for the Inside of the Envelope:

On a separate sheet of paper, please include the following information:

- Your full name(s) (clearly printed).
- Complete mailing address, including ZIP code.
- Contact numbers (include cell, work, and home numbers).
- Email addresses.
- Indicate if the account information on file should be used for any refunds:
 - If yes, please write, "Use same account on file."
 - If using a different account, provide the account number, routing number, bank name, and specify if it is a savings or checking account.
- If claiming dependents on your tax return, include proof of dependency (documents showing dependents' names with the same address as yours).
- If you paid car taxes in 2024, please indicate the amount.

Additional Information (if applicable):

- If you renewed your Driver's License in the past year, please provide a copy (front side only).
 - If you bought, sold, or refinanced your home, provide a copy of the disclosure statement.
 - If you made any energy-efficient purchases (e.g., solar panels, exterior doors, windows, new AC, or furnace), please include receipts.
 - If you own rental property, complete a rental property sheet for each property (detailing expenses). This form can be emailed or faxed to you upon request.
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