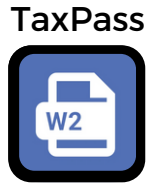




DROP & GO 2024



PERSONAL INFORMATION OR ENTERED IN TAX PASS:

Full Name :

Social Security Number :

Date of Birth : ____/____/____ Phone Number : _____

Address : _____

E-Mail : _____

Status : Single Head of Household Married Filing Separate
 Married Filing Joint **Spouse 2 for Married Filing Joint:**

Spouse Full Name :

Social Security Number :

Date of Birth : ____/____/____ Phone Number : _____

Address : _____

E-Mail : _____

ACKNOWLEDGEMENT

- _____ Deposit is required. Basic Return (\$75), Complex Return (\$200), Business Return (\$350) The deposit is NON_REFUNDABLE and will be applied to the final tax preparation invoice.
- _____ Most returns completed within 24 hrs. Can take up to 2 weeks.
- _____ Customer is responsible for providing all requested documents in a timely manner. Drop & Go does not guarantee on time filing.
- _____ All accounts dropped off after April 1st will automatically require an extension and may not be processed until after IRS filing deadline.

Signature _____ Date _____

OFFICE USE ONLY

Staff Name : _____	Staff Name : _____
Deposit : _____	Tax Preparer: _____
Type (Cash, CC) : _____	Task Created : _____
POS Date : _____	Completed Final Return : _____
Staple Receipt : _____	
CrossLink : _____	

COMPLETE ITEM LIST FOR ANY DOCUMENTS DROPPED OFF

ITEM LIST

PERSONAL AND FAMILY

Did you have any changes in 2023?

Taxpayers:

Dependents:

<input type="checkbox"/>	Copy of ID	Legal Name	Legal Name
<input type="checkbox"/>	Copy of SS	Date of Birth	Date of Birth
<input type="checkbox"/>	Copy of ID	Social Security #	Social Security #
<input type="checkbox"/>	Copy of SS	Address	Address

#

DESCRIPTION

<input type="checkbox"/>	W-2	_____
<input type="checkbox"/>	W-2-G	_____
<input type="checkbox"/>	1099-B	_____
<input type="checkbox"/>	1099-C	_____
<input type="checkbox"/>	1099-G / 1099-R / SSA-1099	_____
<input type="checkbox"/>	1099-K / 1099-MISC / 1099-NEC / K1	_____
<input type="checkbox"/>	1099-Q	_____
<input type="checkbox"/>	1099-S / Home Sale	_____
<input type="checkbox"/>	1099-DIV / 1099-INT	_____
<input type="checkbox"/>	Dependent Care (Child Care) Costs (Need address and SS or EIN)	_____
<input type="checkbox"/>	Investment Expenses	_____
<input type="checkbox"/>	Estimated Tax Payments	_____
<input type="checkbox"/>	Education Costs	_____
<input type="checkbox"/>	Traditional IRA Contributions (Statement)	_____
<input type="checkbox"/>	Residential Energy Credit (Receipt)	_____
<input type="checkbox"/>	Other Documents	_____

STANDARD DEDUCTION OR ITEMIZED

Collect : Receipts and Documents

Married Filing Joint \$27,700
Married Filing Separately \$13,850
Single \$13,850
Head of Household \$20,800

<input type="checkbox"/>	Home Property Taxes	_____
<input type="checkbox"/>	Charitable Contributions	_____
<input type="checkbox"/>	State Sales Tax	_____
<input type="checkbox"/>	Healthcare Premium - ACA	_____
<input type="checkbox"/>	Medical Expenses	_____
<input type="checkbox"/>	Gambling/Lottery Losses	_____
<input type="checkbox"/>	Mortgage Interest	_____

_____ This is a complete list of physical documents provided to Macatax for use in tax prep.

_____ I understand that it is my responsibility to provide any necessary missing forms for the most accurate tax return.

Signature _____ Date _____