

# Drop Off Questionnaire

Client Name: \_\_\_\_\_

Date Received at Spinner & Spinner: \_\_\_\_\_

Contact Phone #: \_\_\_\_\_ Is this cell, work or home (circle)

Email Address: \_\_\_\_\_

Preferred method of contact email or phone (circle)?

Is address the same as last year? If not, please print new address: \_\_\_\_\_

\_\_\_\_\_

New Dependents: Name, Birth date and social security number

We need rent or property taxes paid in 2016. Was this information included? If not, please provide the rent paid or property taxes paid in 2016.

If you own your home, did you do any energy efficient improvements such as new windows, doors, insulation, furnace, hot water heater? If so, please provide documentation.

Sales tax paid on new or used car or other large item such as a boat or RV? If so how much was paid?

Banking information for direct deposit of refunds or debit for balance owed.

Bank Name \_\_\_\_\_ Checking or Savings? \_\_\_\_\_

Routing Number \_\_\_\_\_ Account Number \_\_\_\_\_

Did you receive any distributions from 401k's, IRA's, Roth IRA's, Annuities or 529's?

Did you receive an inheritance?

Did you have any foreign accounts or foreign income?

**Did you have health insurance on yourself and your dependents all of 2016? Please include copy of 1095-A, 1095-B and/or 1095-C if applicable.**