

# 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 2017. Was this information included? If not, please provide the rent paid or property taxes paid in 2017.

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

Did you have any Foreign Bank Accounts or Investment Accounts in Foreign Countries? If so please provide information.

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

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

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

Did you collect unemployment in 2017? **Need to obtain 1099-G on-line in NJ**

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

Did you receive an inheritance?

Did you include copy of discharge papers for New Jersey Veterans?

**Did you have health insurance on yourself and your dependents all of 2017? Please include copy of 1095-A, 1095-B and/or 1095-C if applicable or alternate proof.**

**CLIENT CONSENT FORM TO DISCLOSE CONFIDENTIAL INFORMATION TO THIRD PARTIES**

Federal law requires this consent form be provided to you.

Unless authorized by law, we cannot use, without your consent, your tax return information for purposes other than the preparation and filing of your tax return.

You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

Duration of consent (optional):

I, \_\_\_\_\_, authorize Wendy Spinner and/or

Michael Spinner of Spinner & Spinner, CPA's, P.C. to use my personal tax information, including my name(s), address, telephone numbers and financial information for the purpose of providing financial advising services, sending financial services information and contacting me (us) regarding financial programs that may be of interest to me.

No information will be released to third parties except other financial services professionals who may be working with Wendy Spinner and only after discussion with me (us).

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasurer Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name