

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 2020. Was this information included? If not, please provide the rent paid or property taxes paid in 2020.

Energy related improvements to principle residence? Windows, doors, insulation, solar heating and cooling property? Please provide cost and type.

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 or Family Leave in 2020? **Need to obtain 1099-G on-line on NJ website**

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? (Only needed for newly discharged veterans or those who did not previously file)

Did you have health insurance on yourself and your dependents all of 2020? Please include copy of 1095-A, 1095-B and/or 1095-C if applicable or alternate proof.