

## 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: \_\_\_\_\_  
\_\_\_\_\_

Third Stimulus (EIP) Payment received. Provide copy of Form 6475 from IRS

New Dependents: Name, Birth date and social security number

Advance Child Credit received in 2021. Provide copy of Form 6419 from IRS

Please provide the rent paid or property taxes paid in 2021.

Cash contributions - \$300 max if Single and \$600 Max in Married without itemizing

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 2021? **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 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 2021? Please include copy of 1095-A, 1095-B and/or 1095-C if applicable or alternate proof.**