

Flower City Tax 2017 Drop Off Information Sheet

New Client

Provide 2016 copy

Client's Name: _____ Spouse's Name: _____

Client's DOB _____ on file Spouse's DOB _____ on file

Address: _____ Same as last year

****Drivers License ID _____ Document # _____ Issue Date _____ Exp Date _____**

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NEW - Have you had any transactons regarding Crypto Currency ie; Bitcoin etc in 2017? _____

If we have questions regarding your tax return before completion, would you prefer to be contacted by: Email or Phone (please provide both regardless)

Email address: _____ Phone #: (____) _____ - _____ OK to text

What is the latest time at night that we can call or text? 8 pm 9 pm 10 pm

Our preferred method is to provide your copy in our secure portal, check if you prefer a paper copy *

Once we have completed your tax return, if you would like your refund/balance due to be electronically deposited/withdrawn, please complete the box below.

Direct Deposit Federal & State Refunds

ACH for Federal and State Balance Due
ACH is done on 4/17 regardless of when
tax return is filed unless another date is specified

No Direct Deposit, mail checks

Attach a voided check or:

Bank Name: _____

Routing # _____

Acct # _____

___checking ___savings

Do you need your fee deducted from your refund?

Yes (\$45 bank product fee and additional paperwork applies)

I have completed the ACA Questionnaire, attached. Form 1095-A from the Marektplace included.

I have read and signed the Letter of Engagement and the Privacy Policy.

All my dependents are the same as last year. If not provide names, SSN, relationship and dates of birth.

Proof of residency must be provided for all EIC, Head of HH and Child Tax Credit situations. Other restrictions may also apply.

_____-_____-_____-_____/_____/_____ Daycare Tuition

_____-_____-_____-_____/_____/_____ Daycare Tuition

_____-_____-_____-_____/_____/_____ Daycare Tuition

For Daycare, we need name, address and SSN or EIN of all providers, and totals for each child seperately.

For College Tuition Credits, we need year in school for 2017, Form 1098-T and copies of tuition bills. See school bursar info.

Notes to us: _____

Your preparer will contact you to discuss your result or get additional information No returns will be filed until we have obtained signatures on the e-file authorizations, **due diligence documentation**, and payment has been made. Signature forms can be faxed, uploaded or e-signed for us. If we are not deducting your fee, payment can be phoned in or made in person via cash or credit/debit card.