

2022 JFS TAX RETURN DROP OFF QUESTIONS
(to be included with all drop off tax returns)

Is your contact information the same? Yes No

If not, please provide updated information:

Address, Phone, Cell, Email: _____

Is your bank routing & account number the same for direct deposit purposes? Yes No

If not, provide correct info:
Rtg: _____ Acct: _____

Did you update your Driver's License in 2022? Yes No

DL# _____

Issue Date _____ Exp Date _____

Did your spouse update their Driver's License in 2022? Yes No

DL# _____

Issue Date _____ Exp Date _____

Were you on Unemployment in 2022? Yes No

Was your spouse on Unemployment in 2022? Yes No

(If so, please provide Forms 1099-G.

You must print this from the state unemployment website.)

Did you pay any Federal Estimated tax payments in 2022? Yes No

If so, provide dates and amts paid. _____

Did you pay any State Estimated tax payments in 2022? Yes No

If so, provide dates and amts paid. _____

Have you and your spouse created IRS accounts and received IP PINS for the 2022 tax return? Yes No

(Would have been issued in 2023.)

If so, please provide 2023 PINS. Taxpayer PIN _____ Spouse PIN _____

Were you or your spouse on Obamacare (Marketplace) Health Insurance in 2022? Yes No

If so, you must provide us with Form 1095-A.

In 2022, did you receive, sell, exchange, or dispose of any virtual currency? Yes No

If so, please provide 1099 Forms.

Add'l Notes for Preparer:
