

Client Name: _____

Date: _____

2023 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 2023? Yes No
DL# _____
Issue Date _____ Exp Date _____

Did your spouse update their Driver's License in 2023? Yes No
DL# _____
Issue Date _____ Exp Date _____

Were you on Unemployment in 2023? Yes No
Was your spouse on Unemployment in 2023? 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 2023? Yes No
If so, provide dates and amts paid. _____

Did you pay any State Estimated tax payments in 2023? Yes No
If so, provide dates and amts paid. _____

Have you and your spouse created IRS accounts and received IP PINS for the 2023 tax return? Yes No
(If so, please provide 2024 PINS for use Taxpayer PIN _____ Spouse PIN _____
with your 2023 tax returns.)

Were you or your spouse on Obamacare (Marketplace) Health Insurance in 2023? Yes No
If so, you must provide us with Form 1095-A.

In 2023, did you receive, sell, exchange, or dispose of any virtual currency? Yes No
If so, please provide 1099 Forms.

Add'l Notes for Preparer:

