Flower City Tax - Drop Off Information

Today's date:	New to Flower City Tax? ☐ Yes ☐ No	Tax Year:

Client Information		
Client name:	Date of Birth:	SSN:
Spouse name:	Date of Birth:	SSN:
Address:		
City, State, Zip:		

Best way to contact you if we have questions	
Telephone number:	Email address:

Have you had any transactions regarding Crypto Currency, ie. Bitcoin, etc.? ☐ Yes ☐ No

Do you have any foreign bank accounts? ☐ Yes ☐ No

Have you purchased an electric vehicle before September 20, 2025? ☐ Yes ☐ No

Tax Return: Refund/Balance

Once we have completed your tax return, which method would you like your refund/balance due to be electronically deposited/withdrawn? ***Refund paper checks are no longer available.***

☐ Direct Deposit for Federal & State Refunds **Attach a voided check** ☐ Checking ☐ Savings	☐ ACH for Federal & State Balance Due ACH is done on completion of tax return unless another date is specified

☐ I have read and signed the Letter of Engagement and the Privacy Policy (attached).

☐ My dependents are the same as last year.	☐ My dependents changed last year. *

* Please provide names, Social Security number, relationship to you and date of birth.
Proof of residency must be provided for all EIC, head of household, and Child Tax Credit situations. Other restrictions may also apply.

Name:	SSN:	Relationship:	Date of Birth:	
				☐ Daycare ☐ Tuition
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Daycare: Provide name, address and SSN/EIN of all providers and totals for each child separately.
Tuition: Provide year in school, Form 1098-T and copies of tuition bills. (See school bursar for info.)

Copies of the following are required:	
☐ Each tax payer's driver's license (front and back) ☐ Voided check with Routing and Account number ☐ Last 2025 paystub to show any overtime, if applicable	☐ Social Security cards for each family member ☐ Daycare provider information ☐ Tuition – Form 1098-T, tuition bills, school year

Notes to us:

Your preparer will contact you to discuss your result or get additional information.
NOTE: No returns will be filed until we have obtained signatures on the e-file authorizations, due diligence documentation, and payment for services has been made. Signature forms can be faxed, uploaded, or e-signed.

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