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:
Spouse name:	Date of Birth:

☐ Include a copy (front and back) of each tax payer's driver's license.

Address:
City, State, Zip:

Best way to contact you if we have questions

Telephone number:	OK to text: ☐ Yes ☐ No

Email address:

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

Tax Return: Stimulus/Refund/Balance

Total third stimulus household dollars received in 2021. $_____ (March 2021)	Total Advance Child Tax Credit dollars received in 2021. $_____

Once we have completed your tax return, which method would you like your refund/balance due to be electronically deposited/withdrawn?

☐ Direct Deposit for Federal & State Refunds **Attach a voided check** ☐ Checking ☐ Savings	☐ No Direct Deposit mail checks	☐ ACH for Federal & State Balance Due ACH is done on 4/15 regardless of when tax return is filed 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 birth date.
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.)

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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