


# Drop Off Check List

## The following items are required for your tax return preparation:

- 1) We need all pertinent tax information : W2's, 1099's such as Interest, Dividends, Brokerage Statements, 1098 Mortgage Interest Statement, 1098-T College Tuition
- 2) Did you receive unemployment insurance in tax year 2024? Yes No
- \* If yes, you must download form 1099G from the NY State Website.  
Scan QR Code or see URL link below:
- <https://dol.ny.gov/unemployment/1099-g-tax-form>
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- 3) Did you obtain your health care insurance through the NY State market place Health Care exchange? \* If yes, form 1095A should have been mailed to you: Yes No

## Please help keep us up to date with your latest personal information:

Best Contact Phone Number: \_\_\_\_\_ Cell Home  
Best Contact email: \_\_\_\_\_

Has your address changed? Yes No

If yes, new Address: Street: \_\_\_\_\_  
Town: \_\_\_\_\_  
State: \_\_\_\_\_ Zip code: \_\_\_\_\_

Has your Bank information for direct deposit changed? Yes No

If yes, new Routing No: \_\_\_\_\_  
If yes, new Account No: \_\_\_\_\_  
Circle Account Type: Checking Savings

Would like us to text you when your return is ready? (cell phone only) Yes No

Signature: \_\_\_\_\_ Date: \_\_\_\_\_