


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 2023? 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>
- 
- 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

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: _____