

2023 Mail, Drop off and Appointment Questionnaire

NAME: _____	SIGNATURE _____
Day or Cell Ph# _____	SIGNATURE _____ <small>(Signature to Authorize e-file)</small>
Best Time To Call: _____	Email: _____
<input type="checkbox"/> Same Address <input type="checkbox"/> Change of Address _____	

Filing Status Single Married Filing Joint Married Filing Separate Head of Household Claimed as Dependent

Health Insurance Did you purchase health care through Covered California anytime in 2023? Yes No
(If Yes, we need IRS Form 1095-A)

Did you and family have medical insurance in 2023? Yes No

Direct Deposit Information

Direct Deposit: Bank Name _____ Checking
 No Direct Deposit Routing # _____ Acct. # _____ Savings

Rapid Refund Options I want \$125 (Bank Charge) + Plus Prep Fee subtracted from refund.

Rapid Direct Deposit Rapid (Print Check) Rapid (Mail Check)

Dependent Changes: Adding Dependent Removing Dependent

First Name	Last Name	DOB	Social Security #	Relationship

Child Care Information: None

Provider _____	Address _____
Phone # _____	_____
Amount Paid \$ _____	Dependent(s) _____ SS# or Fed ID# _____

Income - 1099's to include

Unemployment/EDD \$ _____

Social Security (H) \$ _____ (W) \$ _____

Bank Interest - (1099-Int) \$ _____

Dividends - (Need 1099-Div) \$ _____

Gambling Winnings (W2-G) \$ _____

Alimony Received \$ _____

Misc. - (1099-Misc) \$ _____

Sale of Stock - (Need 1099-B)

Retirement Distributions - (Need 1099-R's)

Cancellation of Debt - (Need 1099-C) \$ _____

Misc. Deductions

IRA - Traditional \$ _____

Roth \$ _____

Alimony Paid \$ _____

Student Loan Int \$ _____

Energy Credits/Solar = Explain \$ _____

Educational Expense (1098-T)

Tuition \$ _____

Books/Supplies \$ _____

Student's Name(s) _____

School Name _____

School Address _____

Notes: _____
