

MARTIN FINANCIAL SERVICES, INC.

222 West Pointe Drive, Swansea, IL. 62226 ---- 618-233-3000 ---- fax 618-233-3003

Tax Return Information for Dropped Off Returns

Drop Off Date: _____ Referred by: _____

Name: _____ DOB: _____ Occupation _____

Spouse: _____ DOB: _____ Occupation _____

Best way to reach you:

Home Phone Number: _____ Email Address: _____

Cell Phone (Taxpayer): _____ Cell Phone (Spouse): _____

Work Number (Taxpayer): _____ Work Number (Spouse): _____

- 1) Did you pay sales tax on any large ticket purchases such as a car, boat, home remodel in 2019? Yes No
- 2) Did you pay real estate taxes in Illinois during 2019? Yes No
If so, provide copy of tax bill or parcel number & county _____

3) Who else is authorized to pickup your tax return _____

Due to federal privacy requirements, we cannot give out your tax return to someone else unless authorized to do so above.

4) I/We want direct deposit of any refund: Yes No
Please leave voided check for direct deposit

5) Claiming Dependents? Yes No

Name _____	Relationship _____	SSN _____	DOB _____
Name _____	Relationship _____	SSN _____	DOB _____
Name _____	Relationship _____	SSN _____	DOB _____
Name _____	Relationship _____	SSN _____	DOB _____

6) Did any members of your tax household have Market Place health insurance? Yes No

7) For tax year 2019 we will send you an electronic copy of your return. Please indicate if you would prefer a bound copy by checking the box:

Comments: _____

*****New clients please provide a copy of last tax return filed.*****