

MARTIN ACCOUNTING SERVICES, INC.

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

Returning Client Tax Return Information

Drop Off Date: _____

Name: _____

Best way to reach you:

Phone: _____ Email Address: _____

1) Did you pay sales tax on any large ticket purchases such as a car, boat, home remodel in 2020? Yes No

2) Did you pay real estate taxes in your state during 2020? 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 if different than last year*

5) Any changes to claimed dependents? Yes No

**Please note any changes in the comment section below*

6) Did any members of your tax household have Market Place health insurance in 2020? Yes No

7) For tax year 2020 we will send you an electronic copy of your return. Please indicate if you would prefer a bound copy by checking the box:

8) Did you receive a stimulus payment in 2020 or 2021? If so, how much?

Round 1: \$ _____

Round 2: \$ _____

Comments: _____
