

MARTIN ACCOUNTING 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 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 pick up 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 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 either round of payments? If so, how much?
Round 1: \$ _____ Round 2: \$ _____

Comments: _____

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