

RETURNING CLIENT DROP OFF INFORMATION FORM

(THIS OPTION IS JUST FOR RETURNING CLIENTS THAT WE FILED THEIR 2024 TAX RETURN)

Today's date _____ Time _____

Other than the taxpayer, who will be dropping off your personal information:

Full name _____ Contact number _____

Email: _____

- Did your filing status (S, MFJ, MFS, QW) change in 2025? YES/NO If so, why did it change? _____
- Will the dependent(s) on your 2025 remain the same? YES/NO/NA if you're adding a dependent, please provide the Social Security Number. If you are removing a dependent, please explain why: _____
- Do you have a change in address in 2025? YES/NO

- Did you or/and spouse changed employment in 2025? _____ did you or your spouse collect unemployment benefits? YES/NO
- How many W2(s) are included in your drop off? _____ Are you waiting for additional documents YES/NO?

DO YOU HAVE ANY OF THE FOLLOWING: Sole Proprietor, C or S Corporation, LLC. YES/NO

(circle the type of entity) Please provide the Name of the business:

Did you install energy efficiency in your home in 2025 YES/NO

Did you purchase a vehicle in 2025 YES/NO

Go to our website (aaataxsolutions.com) for additional worksheets for several different businesses.

NOTES:

Signature of the person dropping off: _____

