



www.ats1040.net

Please complete the following personal information if this is **your first year** with our firm. Otherwise, simply fill in **any changes** from last year:

Taxpayer

Spouse

Name:	_____	Name:	_____
Social Security #:	_____	Social Security #:	_____
Date of Birth:	_____	Date of Birth:	_____
Occupation:	_____	Occupation:	_____
Phone Number:	_____	Phone Number:	_____
Preferred Email:	_____	Preferred Contact:	_____
Address:	_____		
City:	_____	State:	_____
Referred By: (If new)	_____	Zip:	_____

Dependents

<u>Name</u>	<u>Social Security #</u>	<u>Date of Birth</u>	<u>Income</u>	<u># of Months Child Lived With You During 2023</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Questionnaire

	<u>Yes</u>	<u>No</u>
Did you trade any virtual currency during 2023? <i>If yes, attach tax document 1099-B or realized gain or loss report.</i>	_____	_____
Did you make any charitable donations during 2023? <i>If yes, provide amounts: Cash, check, credit card, or payroll \$ _____ Non-cash: \$ _____</i>	_____	_____
Did you receive a direct tax rebate payment from the State of Minnesota during 2023? <i>If yes, provide amount and attach Form 1099-Misc \$ _____</i>	_____	_____
If you receive a refund, would you like direct deposit? <i>If yes, provide a voided check if not already on file.</i>	_____	_____

By completing this drop off form you acknowledge that it is recommended you also review our Personal Organizer and complete any sections that apply to your tax situation and attach those sections to this drop off form.

By signing below you acknowledge that, to the best of your knowledge and belief the information contained on this form is both accurate and complete.

_____	_____
Signature	Date
_____	_____
Signature	Date