

GOLD STAR DROP OFF SERVICE

Preparer requested: _____

Preferred contact method (circle one): call text email

Date: _____

Name: _____ D.O.B. ____/____/____

Spouse Name: _____ D.O.B. ____/____/____

Current Address: _____

City: _____ State: _____ Zip: _____

Phone Number: _____ E-mail Address: _____

Cell Phone: _____ Accept Texts? Yes No

Have you moved since you last filed? Yes No

How many W-2's # / 1099's #?. W2 ____ 1099 ____

Did you receive any unemployment (enclose 1099-G)? Yes No

Other Non-Taxable Income: Child support \$ _____ State cash assistance \$ _____

VA Disability Benefits \$ _____ Cash Gifts Received \$ _____

Alimony Received \$ _____ Alimony Paid \$ _____ Year of Divorce _____

Amount of 3rd Stimulus payment received during March/April 2021 \$ _____ (\$1400/person)

Amount of advanced child tax credit received 2021: \$ _____

Did you make any charitable contributions that you would have proof of? Yes No

Did you pay for any college tuition this year (enclose 1098-T)? . . . Yes No

Did you pay for any child care? Yes No

Did you do any energy saving improvements to your home last year? Windows Exterior Doors

New Roof New Furnace or Central A/C New Water Heater Insulation Geothermal / wind / solar

Did you contribute money into an IRA (not through work)? Yes No

Do you rent or own? Rent Own Neither

If you rent, how much do you pay per month? \$ _____

Number of months rented January to December _____ rented all 12 months

Landlords Name: _____

Landlords Address: _____

Is your heat cost included in rent? Yes No

Name of energy provider _____

Type of heat (circle one): Electric – Fuel Oil – Natural Gas – Propane – Wood / other

Are you Self Employed? Yes No

(if so, total all receipts into categories - DO NOT DROP OFF RECEIPTS!) (It is your responsibility to have receipts for all claimed deductions)

Did you receive any PPE loans or government grants for your business? Yes No

Did you have Marketplace health insurance last year? Yes No (include form 1095-A)

Did you own any property/accounts outside of the U.S.? Yes No

Did you sell or exchange any cryptocurrency last year (i.e. bitcoins)? Yes No

Has anything changed since you last filed? Yes No

If so, what changed? _____

7 DAY TURNAROUND TIME * Preparer may call for a brief phone interview by turnaround time
* Return may not be finished on time if more information is needed

PLEASE MAKE SURE YOU INCLUDE ALL PERTINENT PAPERWORK WHICH WILL BE USED TO PREPARE YOUR RETURN. GOLD STAR IS NOT RESPONSIBLE FOR MISSING OR INCOMPLETE DATA FURNISHED BY YOU.

Taxpayer: _____ Date: _____

Spouse: _____ Date: _____



