



# Zippy Income Tax

## Drop Off Sheet

Website: [zippyincometax.com](http://zippyincometax.com)

(760) 401-3017 or Fax (760) 693-1599



Did you file Taxes with Zippy Tax last year?  Yes  No

Please bring in your Last Year's Tax Return (New Clients Only), W-2's, Social Security Cards for Dependents, 1099's, etc.

First Name	Last Name	Date of Birth	Drivers Lic. # & Exp.	Social Security
Spouse First Name	Spouse Last Name	Date of Birth	Sps. Driver Lic. # Exp.	Spouse Social Security
Home Address	City	State	Zip	Home Phone
Primary E mail Address	Cell Phone	Name of Employer	Occupation	Work Phone
Spouse Email Address	Cell Phone	Name of Employer	Occupation	Work Phone

### Taxpayer

### Spouse

### Marital Status

Blind  Yes  No       Yes  No       Single       Head of Household (with dependent)  
 Disabled  Yes  No       Yes  No       Married       Married Filing Separate  
 Pres. Campaign Fund  Yes  No       Yes  No       Widow(er)       California Domestic Partner

Did you purchase a new home in 2008 and receive the first time home buyers credit?  Yes  No,

Number of W-2's enclosed: \_\_\_\_\_ Other documents enclosed (forms 1098, 1099 etc.):  Yes  No

State of residence: \_\_\_\_\_ Did you live and work the entire year in this state?  Yes  No

If no, list other states: \_\_\_\_\_

### Dependent Information (or persons living in your household) (If more than two use the back of this sheet)

Name	Date of Birth	Age	If 19 or Older Fulltime Student	Social Security #	Relationship	Months Lived With You
			<input type="checkbox"/> Student <input type="checkbox"/> Disabled			
			<input type="checkbox"/> Student <input type="checkbox"/> Disabled			

### Day Care Information

Provider Name	Address and Phone Number	Federal ID #	Child's Name	Amount Paid

Would you like to receive additional information on various filing and settlement alternatives such as:

- Electronic Filing
- Direct Deposit or Debit
- Bank options: IRS Direct Deposit, Bank Loans: RAL Deposit or a Refund Transfer/ Direct Deposit Preparation Fees Deducted
- If I'm due a refund, I would like the convenience of having fees taken out of my refund instead of paying Zippy Tax out of my pocket.

(Please List your Bank's Information for IRS Direct Deposit, RAL Deposit or Refund Transfer Direct Deposit)

Bank's Name	Bank Routing Number	Bank Account Number	Checking or Savings
			<input type="checkbox"/> Checking or <input type="checkbox"/> Savings
			<input type="checkbox"/> Checking or <input type="checkbox"/> Savings

### Checklist of items to leave with your Tax Professional:

- This Sheet
- Your W-2s
- Your 1098 and 1099 forms

Your tax professional will contact you within 24 hours to ask any additional questions required to complete your tax return and Provide you with an estimated completion time.

Signature \_\_\_\_\_ Date \_\_\_\_\_