TAX DROP OFF INFORMATION SHEET

Name(s):	
Address:	CHECK IF CHANGE
Phone:	Email:
If address changed please provide dates at each residence.	
REVIEW PRIOR YEAR TAX RETURN FOR TH	E FOLLOWING:
DEPENDENTS: Same NEW-Please provide Name, DOB & SSN	
Remove:	(NAME(S))
College Students:	Form 1098T must be provided
BANK:	
Did your bank CHANGE: Yes	NO
If YES – attached new bank information	
UNREIMBURSED EMPLOYEE EXPENSES (STATE AND LOCAL ONLY)	
Initial here to verify you possess receipts and proof of deductions	
PLEASE PROVIDE LIST WITH EXPENSE <u>TOTALS</u> – DO NOT INCLUDE RECEIPTS	
IRA Contributions:	(Traditional/Doth) firds one
	(Traditional/Roth) Circle one
Spouse IRA contributions	
NEW FOR THIS YEAR:	
• Child Tax Credit – if you were eligib	ble you will receive a letter stating how much (if any)
advance payments you received – you must include that with your documents	

• Up to \$300 in Charitable contributions may be deducted even if you do not itemize – My Contributions are: \$_____

Other Items you may need to enclose if applicable to you:

- W-2s (ensure your personal information is correct)
- 1099R(s) (distributions from IRAs, Pensions, Retirement Funds)
- Social Security Statement
- Unemployment Compensation (available via your UC login)

CONTINUED ON BACK

- W2G(Gambling winnings) DO NOT INCLUDE LOSING TICKETS, ETC. ONLY THE AMOUNT
- Mortgage Interest Statement
- 1098T (college tuition available via most student portals)
- Stimulus payment information
- 1099-NEC (non-employee compensation)
- Student Loan Interest (available via most online services)
- 1095 (available via your Marketplace login)
- Daycare Statement (must include EIN, address and total paid per child)
- Brokerage Statements, these include:
 - **1099 DIV**
 - **1099 INT**
 - o **1099 B**

Available at <u>www.HudsonBusinessService.com</u> under <u>Tax Resources</u> are forms to assist small business owners (Schedule C Filers) and Landlords (Schedule E Filers) organize their income and expenses for the year.

Also, <u>Payment may be made at our website using the OnLine Bill Pay link on the home page</u>

Once you have ensured your documents are COMPLETELY gathered and this form is filled out in its ENTIRETY, place all documents in a sealed envelope, write your name and phone number on the outside and drop off anytime that is convenient for you. The SECURE drop slot is located at the rear of the building (parking lot side) and is accessible 24 hours.

Additional notes below:

I verify the above information is true and correct. I authorize Hudson Business Service to compile my Federal / State and/or Local return based on the provided information. Any missing or incorrect information is the responsibility of the tax payer. <u>Tax returns will be e-filed after payment received and appropriate forms signed.</u>

Signature(s):_____