

# Youngs Tax Service - Drop-Off Form - Returning Clients

**Taxpayer Name:** \_\_\_\_\_ **Occupation:** \_\_\_\_\_

Cell Phone: \_\_\_\_\_ E-Mail: \_\_\_\_\_

**Taxpayer Driver's License –REQUIRED FOR ALL RETURNS: (Include copy of Driver's License or fill out below)**

DL Number \_\_\_\_\_ or State ID Number \_\_\_\_\_

Issue Date (Ohio DL on bottom center - line 4a ISS) \_\_\_\_\_ Expiration Date (Ohio line 4b) \_\_\_\_\_

**Spouse Name:** \_\_\_\_\_ **Occupation:** \_\_\_\_\_

Cell Phone: \_\_\_\_\_ E-Mail: \_\_\_\_\_

**Spouse Driver's License - REQUIRED FOR ALL RETURNS: (Include copy of Driver's License or fill out below)**

DL Number \_\_\_\_\_ or State ID Number \_\_\_\_\_

Issue Date (Ohio DL on bottom center - line 4a ISS) \_\_\_\_\_ Expiration Date (Ohio line 4b) \_\_\_\_\_

**Mailing Address**(Only If you moved in the last year): \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ County: \_\_\_\_\_

School District: \_\_\_\_\_ Date Of Move \_\_\_\_\_

**Banking Information For Refund or Balance Due: (Optional)**

Use Account For: Refund \_\_\_\_\_ Balance Due \_\_\_\_\_ Date the balance due should be withdrawn from your account \_\_\_\_\_

Routing #: \_\_\_\_\_ Account #: \_\_\_\_\_ Checking \_\_\_\_\_ Savings \_\_\_\_\_

**Dependents:** Any change in dependents? If so, please fill out below: (Circle one: ADD / REMOVE )

Name: \_\_\_\_\_ DOB: \_\_\_\_\_ #Months in home \_\_\_\_\_

Relationship: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset?) (Circle = Yes / No ) Include form 1099 for any sales.

Did you contribute to, or receive funds, from a Health Savings Account? (Include 1099-SA for distributions) (Circle = Yes / No )

Did you pay for Dependent Care? (Include provider statement with address and EIN/SSN of provider) (Circle = Yes / No )

Did you receive a 1099-K (Circle = Yes / No )

Please include any other tax statements/documents that relate to your tax return.