

Youngs Tax Service - Drop-Off Form

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)

DLNumber (or State ID) Number _____ Date of Birth _____

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)

DLNumber (or State ID) Number _____ Date of Birth _____

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 _____

***** New for 2025 **** - Now Required For All Returns -Banking Information For Refund or Balance Due:**

For Balance Due - **Date the balance due should be withdrawn from your account** _____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: _____

NEW CLIENTS ONLY-Social Security # - Taxpayer _____ **Spouse** _____

At any time during 2025, 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)

Do you have foreign accounts or trusts, or have signature authority over foreign accounts or trusts? (Circle = Yes / No)

NEW - Did you buy a new car with final assembly in the U.S. - need a statement with the Vin # and the amount of interest paid

NEW - Did you receive overtime pay or tip compensation for Tax Year 2025? If so, please include your last paystub, or any other relevant employer provided documentation indicating these amounts.

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