

# DiMarco & Company, Inc.

## 2020 Income Tax

# Drop-Off Form

Please complete **BOTH SIDES** of this form and return to our office with all your documents.

**Name:** \_\_\_\_\_

### Filing/Marital Status:

Same

Changed

If your filing/marital status has changed...

Single

Married (*enclose a copy of Driver's License-front and back, and 2019 Income Tax Return*)

Name: \_\_\_\_\_

SSN/ITIN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Occupation: \_\_\_\_\_

Head of Household (even if not claiming dependent may qualify if child lived w/ you 6+ months)

Widowed

*(Please include additional information or contact our office for required documents)*

### Address:

Same

New: \_\_\_\_\_

### Contact Information:

Best Phone #'s: \_\_\_\_\_ and \_\_\_\_\_

Email: \_\_\_\_\_

**Best Follow-up method:**  Phone  Email

**Economic Impact Payment(s) Received:** EIP1: \$ \_\_\_\_\_ EIP2: \$ \_\_\_\_\_

### Dependents:

Same

New Dependent...  Adopted a child (*please contact us...*)

Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Relationship: \_\_\_\_\_

SSN/ITIN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

*If applicable...*

Full-Time Student

Disabled

Change: \_\_\_\_\_



If any dependents did not live at the primary taxpayer's address the entire year, please let us know so we can discuss the tax consequences.

**Dependents (Cont.): (PLEASE ENCLOSE)**

- Paid child / dependent care expenses
- Tuition (1098-T) and education expenses

**Income Sources: (PLEASE ENCLOSE)**

- Employer (W-2)
- Unemployment (1099-G)
- Social Security (SSA-1099)
- Retirement plan distribution (1099-R)
- Interest (1099-Int)
- Dividends (1099-Div)
- Stock or mutual fund sale (1099-B)
- Self-employment / miscellaneous income (1099's if applicable)
  - Expenses from self-employment
- Rental property (1099's if applicable)
  - Expenses from rental property

**Other:**

- HSA Distributions (1099-SA) Used for Qualified Medical Expenses?  Yes  No
- Made a major taxable purchase
- Had a mortgage payment (1098)
- Paid property taxes
- Large out-of-pocket medical expenses
- Sold a home
- Paid / received alimony
- Had gambling winning / losses
- Paid Student loan interest (1098-E)
- Cash contributions made to qualifying organizations of up to \$300 (new for 2020 non-itemizers)
- Made an IRA contribution

**Direct Deposit and Direct Debit**

Do you want your refund directly deposited into your account?  YES  NO

Do you want the amount owed to be directly withdrawn from your account?  YES  NO

If yes, please attach a VOIDED CHECK or CONFIRM the last 4 digits of an account used for 2019.  
# \_\_\_\_\_

**YOUR TAX RETURN WILL NOT BE PREPARED WITHOUT ALL OFFICIAL FORMS.**

We will notify you with any questions and/or when the return is completed.

Upon Completion, you MUST sign and pay the preparation fee before your return can be submitted electronically.  
Due to COVID-19, we are using technology solutions where possible to reduce person-to-person interaction.

We will be accepting Drop-Off information including this form at our office located at:

**DiMarco & Company, Inc.**  
1207 N. Military Road  
Niagara Falls, NY 14304  
Email: dimarcoaccounting@gmail.com