

Drop-Off Information Needed

Name _____ Social Security Number _____

- Complete a Client Information Worksheet
- Sign a Work Agreement
- Do we have a copy of your and your spouse's current I.D.?
- Proof of residence for each dependent *

What is your preferred method of communication? Phone or email? Please make sure we have correct information on the **Client Information Worksheet**.

What is your preferred method of payment for our fee? Options are cash, check, credit, or debit.

Would you prefer to stop in the office to pay or we can send a Square invoice by email for credit or debit cards. Paying via phone is also available with a credit or debit card. Or we can provide a form that you can fill out with your debit or credit information. This form will be shredded after payment is made.

Would you prefer to stop by the office to sign all signature forms once the return is completed? Or would you like to use an esignature method? We use RightSignature. To do this we would need a valid email address.

Would you prefer to pick up your completed return or have us mail it to you?

*Acceptable proof of residence includes:

- Copies of school (no report cards), medical or social services records
- Letter on official letterhead from school, a healthcare or medical provider, social service agency, placement agency official, employer, Indian tribal official, landlord or property manager or a place of worship that shows:
 - The name of the child's parent or guardian
 - The child's address matching your own
 - Dates the writer knows the child lived with you
- Daycare records or a letter from your day care provider (if the daycare provider is related to you, you must have at least one other record or letter that shows proof of residency)