

**DALE TAX SERVICE**

**TAX DROP OFF FORM**

215-342-4200 215-342-8601 fax

Name: \_\_\_\_\_ Social Security #: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
 Spouse Name: \_\_\_\_\_ Social Security #: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
 Date of Birth: \_\_\_\_\_ Spouse Date of Birth: \_\_\_\_\_  
 Phone Number: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Best Time to Call: \_\_\_\_\_  
 Alternate Number: (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Latest Time to Call: \_\_\_\_\_  
 Client Occupation: \_\_\_\_\_

Please check all that apply:

- Copy of Last Year's Return Attached
- Return prepared at this location last year
- Address on last year's return still current
  - No, please provide current address: \_\_\_\_\_  
\_\_\_\_\_
- W-2's enclosed
  - No: Please explain \_\_\_\_\_  
\_\_\_\_\_
- Number of W-2's enclosed: \_\_\_\_\_
- Number of other documents: \_\_\_\_\_
- Other Documents enclosed (Forms 1098, 1099, etc.)

State of Residence: \_\_\_\_\_  
 Did you live and work the entire year in this state? \_\_\_\_\_  
 If no, list other states: \_\_\_\_\_

Dependents (or persons living in your household), if more than 2 please use back

Name: \_\_\_\_\_ Social Security #: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
 Date of Birth: \_\_\_\_\_ Relationship to you: \_\_\_\_\_  
 Name: \_\_\_\_\_ Social Security #: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_  
 Date of Birth: \_\_\_\_\_ Relationship to you: \_\_\_\_\_

Please check all that apply:

- Did Dale Tax Service prepare your return last year?
- Did you own rental property?
- Do you own your own business?
- Do you have retirement income or Social Security?
- Do you have mutual funds or stocks?
- Do you have a Partnership, Corporation, or Trust?
- Do you own your home?
- Did you pay any student loan interest in 2004?
- Did you have education expenses for anyone on your return?
- Do you have a coupon?
- Are you making tax payments for a prior year?
- Do you have any delinquent obligations such as back taxes, alimony, child support, student loans or prior refund anticipation loans?

How would you like to file your return? Please Circle:

Electronic Filing    Direct Deposit    RAL    Paper Return

Questions or other information for my tax professionals: (Be sure to indicate if you moved or suffered damage or destruction of property from a storm, accident, theft, or other unusual occurrence during the year). Please include any other income or deductions not shown on your tax documents. Feel Free to write any other additional information on the back of the sheet.