

Current Client Drop Off/Portal Form (If married only fill out one form.) OBTS Date Received: _____ Initials _____

Taxpayer Name	
Birth Date	
SSN	
Phone <input type="checkbox"/> Cell?	
Occupation	
Email	
Address (include City, State, zip please)	

Spouse Name	
Birth Date	
SSN	
Phone <input type="checkbox"/> Cell?	
Occupation	
Email	

- Single
 Married filing Joint (MFJ)
 Married but filing Separate (MFS)
 Give spouse Name/SSN/birth date above
- Lived separate from spouse for last 6 months of year or more
 Divorced during the tax year
 Date: _____
- Head of Household (unmarried with dependent(s) in the house)
 Widowed during the tax year
 Date: _____

Note: If MFJ, "I" means "we."

I have a child or children that I claim on my return and will fill out the Dependent Form. I am also verifying that I have asked my children not to file their own tax return until the IRS has accepted my filing (if we need to paper file and amend to correct a mistake there will be an extra fee). I understand that you will file basic dependent returns (W-2's) for \$25.00 per dependent. More complicated dependent returns will be given a minimum 20% discount.

I received interest on my federal refund but did not receive a 1099-INT. Amount of interest to report \$ _____.

I received income from car sharing, freelancing, crowdfunding, short-term rental, fashion sharing. If yes, provide 1099-MISC, 1099-K, mileage log and supplemental reports/documentation.

I spent \$ _____ this year on higher education for Me, My Spouse. It was: Undergraduate, Graduate (If it was for a dependent include it on the Dependent Form).

I am a qualified educator and spent \$, including for PPE for 2022. Me \$ _____ Spouse \$ _____

I was a resident of the state of _____ for the whole year I was a part-year resident of these cities/states: _____ & _____
 Moved: Date: ____/____/____ from (city, State): _____ to (city, State): _____
 (Military only – spent \$ _____ on moving/storage, & \$ _____ on travel/lodging.) Non-military – no deduction.

I made Traditional IRA contributions (outside of work). For me \$ _____, Spouse \$ _____

I made Roth contributions (outside of work). For me \$ _____, Spouse \$ _____

I converted a traditional IRA to a Roth IRA in 2021. For me \$ _____, Spouse \$ _____

I received, sold, sent, exchanged, or acquired interest in virtual currency this year. (i.e. Bitcoin-Include docs if this applies to you).

I have over \$10,000 in a foreign bank account.

I own my home; The value of my mortgage is less than \$750,000 (if over \$750k, what is the value? \$ _____)

I pay interest on a home equity loan; I spent the loan \$ on the home, on other items (paid credit cards, car, etc.)

I own a 2nd home that is not a rental

I donated **money** to charity: total amount: \$ _____ **The extra charitable deduction allowed with the standard deduction has expired.** Keep all of your charity receipts/letters in your files unless you will itemize. We don't need to see them. Be sure you have an IRS approved statement from a qualifying charitable organization for all contributions.

I donated **items** to charity: estimated value: \$ _____ If over \$500 worth of items donated we'll need to know: Which Charity? _____ What kind of items? Clothing, Furniture, Household items, other: _____

I spent \$ _____ out of pocket on medical. You would need to have spent over 7.5% of your income AND even if you're not itemizing this deduction could reduce your Ohio taxable income. Taxpayer \$ _____ Spouse \$ _____

I spent \$ on out-of-pocket long term care premiums. Taxpayer \$ _____ Spouse \$ _____

I am not a full-time employee of a company and I pay for my own health insurance premiums that are not deducted from any paystubs: \$ _____ for the year. I purchased insurance through the Marketplace and have enclosed the required 1095-A.

I received an advance premium tax credit from the Marketplace. I was granted a hardship waiver from the Marketplace.

I drove _____ miles doing volunteer work for a 501(c)(3) charity. Drove _____ miles for doctor visits.

I sent quarterly Estimated Taxes to IRS, State, School District or City/Village: Dates & amounts on separate paper. YOU MUST GIVE US ALL ESTIMATES PAID OR WE WILL ASSUME ZERO!

I got an Identity Protection PIN (IP PIN) from the IRS this year for extra security. Include IRS letter with new IP PIN. If you had an IP PIN last year you will need a new one to file every year. If you didn't get a letter from IRS order another IP PIN on IRS.gov.

I would like to e-sign over the client portal. (email address on front page required) I would like to sign and pick up my tax returns at the office.

PAYMENT OPTIONS—Please circle your preferred method of **payment to OBTS**: Cash Check Post-dated Check Credit Card Bank Product

REFUND OPTIONS—Please circle your preferred method of **refund**: Non-Bank Product: **Direct Deposit**** Check Mailed to TP
Please circle: Checking or Savings

EPS Bank Product: E-Advance (no cost, no interest \$250, \$500 or \$1,000 loan*) or I want to apply for an advance of 25% (no interest), or 50% or 75% of my expected refund (36% APR interest charged). Please choose one of the following ways to get your refund advance: Prepaid Visa Card or Check Picked up at our Tax Office. Minimum bank application fee is \$38.95 plus \$14.00 to add state refund.

I want the rest of my refund as follows OR no advance & I want all my refund as follows:

E1 Prepaid Visa Card EPS Bank Product Direct Deposit EPS Bank Product Check Picked Up At Tax Office

(Other rules/charges apply. See flyer on counter.) *Bank may counter offer \$500 or 25% of your expected refund.

****Info must be provided even if it's the same account as last year (this a new policy for 2022).**

Bank Name _____, Routing # (9 digits) _____, Account# _____.
(voided check or account card is preferred if you changed your account)

Direct Debit my balances due (we will call with amounts) Y N (Please circle one.)

OHIO REQUIRED INFORMATION

Under penalty of perjury, I declare that to the best of my knowledge and belief, the Ohio income tax return, and, if applicable, the Ohio school district income tax return is true, correct and complete. I also declare under penalties of perjury that if I am filing a return with my spouse, I am authorized to make this declaration on his/her behalf and to file the return for both of us.

Yes No (Please circle one. **Your return cannot be filed if you don't accept the statement.**)

Sales tax was paid on all my purchases.

OR: I have taxable purchases totaling \$ _____ on which no state sales tax was ever paid. I agree to pay these taxes on my Ohio return.

Did anything else happen this year that you'd like us to know for your taxes? (continue on separate sheet)

I would like to receive a printed copy of my tax return and supporting documents by mail for \$10 extra. (Our secure online portal will allow you access to your tax return(s) and the documents you uploaded to us or you may pick up your tax package at office.)

Please read and sign below:

I understand that my return will be prepared based on the information I provided. I am solely responsible for the accuracy of that information and for maintaining the records to support it. My documents will not be returned to me by mail unless I chose the regular mail option above, or will be available for me to pick up at the office.

Signature: _____ (REQUIRED) Date: _____

Signature: _____ (REQUIRED) Date: _____