

Express Drop-Off / Pick-Up Service  
Checklist

The *Express Drop-Off / Pick-Up Service* is a great option for clients who, because of their busy schedule, would rather not meet with someone when dropping off their tax information and when picking up their tax return. Only clients with a simple and straightforward tax situation should use this service. To determine if this service is an appropriate option for you, please answer the following questions: **(If you answer “Yes” to any of the questions, you should NOT use this service since meeting with us will be better for you.)**

1. Did you have income from sources *other than* Wages, Tips, Interest, Dividends, Retirement, Unemployment, Social Security? Yes \_\_\_ No \_\_\_
2. Were you self-employed? Yes \_\_\_ No \_\_\_
3. Did you move to Arizona during the year? Yes \_\_\_ No \_\_\_
4. Did you work in a state other than Arizona? Yes \_\_\_ No \_\_\_
5. Did you sell stocks or bonds? Yes \_\_\_ No \_\_\_
6. Did you incur unreimbursed employee expenses totaling more than 2% of your income? Yes \_\_\_ No \_\_\_
7. Did you own rental property? Yes \_\_\_ No \_\_\_
8. Is there anything about your tax situation, which would require an explanation? Yes \_\_\_ No \_\_\_

If you answered “No” to all of the above questions and want to use the Express Drop-Off / Pick-Up Service, please drop off the following information at your convenience – i.e., no appointment is necessary: (Please keep in mind no one will meet with you when you drop off your tax information or when you pick up your tax return. If, after reviewing your tax return, you have questions you may e-mail your questions to Steve, call Steve or schedule an appointment to meet with us.)

- This checklist with both sides (front and back) completed
- **Completed** Tax Organizer (Electronic, PDF or Paper)
- Tax Forms (if applicable)
  - W-2
  - 1099-DIV, 1099-G, 1099-INT, 1099-R, SSA-1099
  - 1098, 1098-E, 1098-T
- Voided check (if you want direct deposit of your refund)
- **Final** Settlement Statement (if you bought, refinanced, and/or sold a home)
- Total sales taxes paid on the purchase of a vehicle, boat, and/or home improvements (list totals separately by category)
- 2010 tax return (if we did not prepare your 2010 tax return)

(over)

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

Miscellaneous Questions

- |   | He  |    | She |    |
|---|-----|----|-----|----|
| ➤ Do you want \$3 to go to the Presidential Election Campaign Fund? | Yes | No | Yes | No |
| ➤ Do you want AZ to give you \$5? (No=AZ keep for clean elections)  | Yes | No | Yes | No |
| ➤ Can someone else claim you as a dependent?                        | Yes | No | Yes | No |
| ➤ Cell phone no.: _____   |     |    |     |    |
| ➤ Occupation: He-_____ She-_____                                    |     |    |     |    |

Filing Status (check one)

- Head-of-household
- Single
- Married filing jointly
- Married filing separately (we will call you with additional questions)

Buy, Sell, Refinance a home

- Did you purchase a home during the year? Yes No
- Did you sell a home during the year? Yes No  
If yes, number of years \_\_\_ and months \_\_\_ lived in as primary residence?
- Did you ever use it for business purposes or as a rental? Yes (we will call you) No
- Did you refinance a home during the year? Yes No  
If yes, what is the length of the loan? \_\_\_ years
- If bought, sold or refinanced a home, provide **Settlement Statements.**
- Did you claim the First-time Homebuyer Credit in a previous year? Yes No  
If yes: Date home bought: \_\_\_\_\_ Credit Amount: \$ \_\_\_\_\_
  
- If you expect a refund on your FEDERAL tax return, how much? \$ \_\_\_\_\_
- If you expect to owe on your FEDERAL tax return, how much? \$ \_\_\_\_\_
- If you are expecting a refund and want Direct Deposit, provide a voided check.
- If you expect to owe on FEDERAL tax return, do you want to make monthly payments to the IRS? If yes, how much monthly? \$ \_\_\_\_\_ When (1-28)? \_\_\_\_\_  
I want to make monthly payments to the IRS if I owe more than \$ \_\_\_\_\_.

**IMPORTANT!** Please have all of your tax documents in an envelope when dropping them off at our office. Hand the envelope to the receptionist *without waiting*. If the receptionist is speaking with someone in-person or on the telephone, don't wait until she is done speaking with them. Hand her your envelope and tell her you are using the Express Service. If you need to explain something to us, please include a note with your tax information or send us an e-mail to [InfoDeskCH@SteveVogtCPA.com](mailto:InfoDeskCH@SteveVogtCPA.com). If, when dropping off your information, the door is locked, please put your documents through the slot in the window next to the door (Chandler office only). Your tax return will be ready for you to pick up seven days later.