

# LARSON TAX REQUEST FORM

**(PLEASE BRING A GOVERNMENT ISSUE I.D.)**

NAME \_\_\_\_\_ DATE \_\_\_\_\_ SIGNATURE \_\_\_\_\_

BEST PHONE # (\_\_\_\_) \_\_\_\_\_ EMAIL \_\_\_\_\_

PREFERRED METHOD OF CONTACT PHONE(\_\_\_\_) \_\_\_\_\_ CELL (\_\_\_\_) \_\_\_\_\_

WOULD YOU PREFER DIRECT DEPOSIT YES \_\_\_\_\_ NO \_\_\_\_\_ NEED ROUTING AND ACCOUNT #

ROUTING# \_\_\_\_\_ ACCOUNT# \_\_\_\_\_

DO YOUR TAXES NEED TO BE COMPLETED TO FILL OUT FINANCIAL AID FOR COLLEGE? YES \_\_\_\_\_ NO \_\_\_\_\_

DID YOU HAVE HEALTH INSURANCE FOR ALL OF 2017? YES \_\_\_\_\_ NO \_\_\_\_\_ IF NO, PLEASE EXPLAIN.

WILL YOU BE CLAIMING THE SAME DEPENDENTS AS LAST YEAR? YES \_\_\_\_\_ NO \_\_\_\_\_ N/A \_\_\_\_\_ IF NO, PLEASE EXPLAIN.

DO YOU FEEL ALL NECESSARY DOCUMENTS HAVE BEEN PROVIDED? YES \_\_\_\_\_ NO \_\_\_\_\_ IF NO, WHAT IS MISSING?

- *IF ITEMIZING: MORTGAGE INTEREST, REAL ESTATE TAXES, CAR REGISTRATION, CHARITY, MEDICAL, ETC.*

DO YOU HAVE YOUR OWN BUSINESS? HAVE YOU INCLUDED ALL NECESSARY PAPERWORK? YES \_\_\_\_\_ NO \_\_\_\_\_ N/A \_\_\_\_\_

- *INCOME, EXPENSES, MILEAGE OR VEHICLE EXPENSES, OFFICE IN HOME, ETC.*
- 

ANY CHANGES FROM LAST YEAR? YES \_\_\_\_\_ NO \_\_\_\_\_

- *CHANGE OF ADDRESS, JOB, RETIREMENT, SELF EMPLOYMENT, LIVING SITUATION, DEPENDENTS, TUITION, ET*

PLEASE HAVE PAPERWORK TO US BY MARCH 15<sup>TH</sup>, 2018 OTHERWISE YOU MAY BE PLACED ON EXTENSION.

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