

LARSON TAX REQUEST FORM

(PLEASE BRING A GOVERNMENT ISSUED 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 2020? 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.

Covid-19 Stimulus Payment: Amount you received \$ _____

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 17TH, 2021 OTHERWISE YOU MAY BE PLACED ON EXTENSION

Current Covid-19 rules

(6 Feet social distance and face masks worn while in Larson Tax Service office space.)

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