

# The Tax Shoppe 2022 Tax Checklist for your **Dependent\***

**Who is filing a return**

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 Phone: 201-327-4965 Fax: 201-327-4930  
 Email: [contact@the-tax-shoppe.com](mailto:contact@the-tax-shoppe.com)

TAXPAYER NAME: \_\_\_\_\_ **\*To be used by anyone who is claimed as a dependent on someone else's return**

SOCIAL SECURITY NUMBER: \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_ Parents' Names: \_\_\_\_\_

DRIVER'S LICENSE #: \_\_\_\_\_ STATE \_\_\_\_\_

ISSUE DATE: \_\_\_\_\_ EXP DATE: \_\_\_\_\_ DOC # \_\_\_\_\_ (NY only)  
 (First 3 digits)

OCCUPATION: \_\_\_\_\_

EMAIL: \_\_\_\_\_

BEST TELEPHONE: \_\_\_\_\_ H C W

ADDRESS: \_\_\_\_\_ CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

**Is this a new address? Yes \_\_\_ No \_\_\_ If yes, Date of Move: \_\_\_/\_\_\_/\_\_\_**

**BEST WAY/PERSON TO CONTACT: PERSON: \_\_\_\_\_ Email \_\_\_\_\_ Phone \_\_\_\_\_ BEST TIME: \_\_\_\_\_**

<p><b>DIRECT DEPOSIT</b> Checking _____ Savings _____</p> <p>If you owe, use this acct for taxes due with return filing Yes ___ No ___                  (Payments can only be made using <b>Checking Account</b>)</p> <p>Routing Number: _____</p> <p>Account Number: _____</p>	<p style="text-align: center;"><b>RETURN HANDLING INSTRUCTIONS</b></p> <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:50%;">Digital copy EMAIL (\$5 additional charge)</td> <td style="width:50%;">Digital copy CD (\$5 additional charge)</td> </tr> <tr> <td colspan="2">Send to address other than parent? Y ___ N ___</td> </tr> <tr> <td colspan="2">Specify: _____</td> </tr> </table>	Digital copy EMAIL (\$5 additional charge)	Digital copy CD (\$5 additional charge)	Send to address other than parent? Y ___ N ___		Specify: _____	
Digital copy EMAIL (\$5 additional charge)	Digital copy CD (\$5 additional charge)						
Send to address other than parent? Y ___ N ___							
Specify: _____							

**Please note that any form of payment is due prior to e-filing of return.**

<b>Prep Payment Info</b>	<b>DIRECT DEBIT FROM CHECKING ACCOUNT</b> (Acct info required)	<b>X</b>	<i>Sign here for cc or direct debit authorization</i>	
	Bank Routing # (First 9 digits on your check) _____		Checking Account Number _____	
	<b>CREDIT CARD</b> MC/Visa/AMEX/Discover	Credit Card Number _____	Expiration Date (mm/yy) _____	CCID on back of card _____
I prefer to pay by cash / check / money order.				

**Please include all income documents. Fill out below if you received 1099-NEC or 1099-Misc.**

**Self-Employment Income:** \$ \_\_\_\_\_ **Expenses recorded properly?** Yes \_\_\_ No \_\_\_ **Mileage Log?** Yes \_\_\_ No \_\_\_ Bz miles \_\_\_\_\_

Occupation: \_\_\_\_\_

<input type="checkbox"/> Auto/Truck Expenses (Incl. yr/make/model/weight – leased or owned - mileage – actual expenses –purchase date/price) _____	<input type="checkbox"/> Cost of Goods Sold _____	<input type="checkbox"/> Advertising & Insurance & Health Insurance _____
<input type="checkbox"/> Tolls and Parking _____	<input type="checkbox"/> Office Expenses & Supplies _____	<input type="checkbox"/> Payroll/Subcontractors (provide W-2's & 1099's) _____
<input type="checkbox"/> Fees/Licenses/Permits _____	<input type="checkbox"/> Dues & Professional Publications _____	<input type="checkbox"/> Postage/Freight/Delivery/Printing _____
<input type="checkbox"/> Telephone & Utilities _____	<input type="checkbox"/> Internet Expenses _____	<input type="checkbox"/> Miscellaneous _____ (List separately)
<input type="checkbox"/> Computer Expenses _____		

**COMMENTS:** (Attach additional sheets if needed)

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**I authorize THE TAX SHOPPE to prepare my 2022 tax return and create my PIN number for Form 8879 to be used as my signature for electronic filing. The information I/we have provided is COMPLETE.**

Signature Taxpayer: \_\_\_\_\_ Date: \_\_\_\_\_