



Orion United Professional Tax Services, LLC

Drop Off Checklist TS 2024

- 1. Complete this form and attach copies of all your supporting tax forms/documents.
- 2. The tax professional assigned to prepare your return will acknowledge receipt of your documents within 24 hours and will communicate with you for any additional information.
- 3. When the return is completed, your tax professional will contact you to finalize your return.

We require that you sign/date the Client Service Agreement (CSA).

CLIENT INFORMATION

Primary Taxpayer
 Marital Status on 12/31/2023:
 Single
 Married
 Widowed

 Last Name M.I. First Name Date of Birth

- -

 SSN or ITIN Occupation

 Street Number/Name City County State Zip

 Best Phone Contact / Number: E-mail contact:

 Driver's License No. State Issue Date Exp. Date

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Spouse

 Last Name M.I. First Name Date of Birth

- -

 SSN or ITIN Occupation

 Street Number/Name City County State Zip
 (if different from above)

 Best Phone Contact / Number: E-mail contact:

 Driver's License No. State Issue Date Exp. Date

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N-AME OF DEPENDENTS/ OTHER DEPENDENTS/ OR PEOPLE WHO LIVED WITH YOU

Full name SSN/ITIN Date of Birth Months lived in Relationship College? Disabled? Income
Home in 2023 to taxpayer

SOURCES OF INCOME

- Employer (W-2) Interest (1099-INT) Dividends (1099-DIV) Social Security/Retirement Unemployment
- Sale of Stock/Shares (1099-B) Self-Employment * Rental Property* 1099K, 1099 NEC/MISC Other * (please describe)

EXPENSES

- Education Medical/Dental/Vision Care Union dues Un-reimbursed job-related costs (**STATE ONLY**)
- Self-Employment * Rental Property* Other

CREDITS & DEDUCTIONS

- Donations to charity Paid Student Loan Interest Child/Dependent Care Expense Mortgage Interest (1098)
- IRA Contributions Property Taxes A major taxable purchase Advance Child Tax Credit Energy Credit

HEALTH INSURANCE

- Enrolled through the federal marketplace (1095-A)

MISCELLANEOUS

- IRA, 401(k) or other distribution Pay/Receive alimony Gambling winnings or losses(1099-G) Adoption
- Sale of Home* Sale of Rental Property* Casualty &Theft losses* IRS Notice Letter

Signature of Taxpayer

Date

Signature of Spouse

Date

* Your Tax Professional will contact you for any additional information needed.