



**ACCOUNTING SOLUTIONS**  
**(716) 681-2694**

[WWW.Tax716.com](http://WWW.Tax716.com)

**2024**

**Must complete and include with your 2024 Tax Return Paperwork**

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE: \_\_\_\_\_

1) Banking info for Direct Deposit or Payments

Circle one:

CHECKING

or

SAVINGS

Routing

Acct #

2) Return Signatures will be done Electronically must provide both Email Addresses

EMAIL:

EMAIL Spouse:

3) How would you like to receive your printed copy of the Tax Return from us?

Check One:

☐

You will PICKUP

10:00 A.M - 2:00 PM Mon-Sat

☐

We MAIL to you

\$15 addl charge to cover postage

4) How much did you contribute to Charity in 2024?

\$

\_\_\_\_\_ Must Include Proof

5) Did you receive *Unemployment* in 2024?

YES

NO

Print 1099G from NYS Unemployment Website

6) Did you pay *Student Loan Interest* in 2024?

YES

NO

Print 1098 E from Student Loan Website

7) Did you pay for *Child DayCare* for dependant in 2024?

YES

NO

Please Provide statement from Daycare facility

8) Did you pay *College Tuition* in 2024?

YES

NO

Print 1098 T from Student Portal

9) Did you pay *Property Taxes* on Primary Home in 2024?

YES

NO

Include 2024 paid Property Tax Bills.

10) Did you install Energy Efficient Products in 2024?

YES

NO

Exterior doors, windows, skylights and insulation materials, Central air conditioners, water heaters, furnaces, boilers and heat pumps. Biomass stoves and boilers

11) Taxpayer or Spouse renewed there Drivers License in 2024

If Yes include new copy of front and back of License

YES

NO

List Below anything we should be aware of or any questions you would like to discuss.

