

# FIRST CHOICE TAX SERVICE - TAX YEAR 2024

Please take a few minutes to read over the information provided below. We hope this will help to make the process as stress free as possible.

**\*\* Information Sheet will be required prior to your tax return being prepared \*\***

*There are separate worksheets if you are self-employed (1099-NEC) or have rental income.*

Info/Worksheets & Checklists can be picked up at our office 24/7, emailed per your request or retrieved from our website at [www.firstchoicetaxes.com](http://www.firstchoicetaxes.com)

**Because of the sensitive material required to complete a tax return and in accordance with Accountant Guidelines we will NO LONGER receive information by EMAIL.**

**\*\* We will ONLY be accepting documents and information in the following ways \*\***

**DROP OFF SERVICE: 9105 Atlee Road, Mechanicsville, VA 23116**

**Our Drop Off Service is available 24/7. We provide plastic folders outside the door for you to place your paperwork in. There is a LOCKED RED Box to place the folder in.**

**REQUEST A LINK TO A SECURE PORTAL TO UPLOAD DOCUMENTS: Send request to [sandy@firstchoicetaxes.com](mailto:sandy@firstchoicetaxes.com)**

**For clients who do require a meeting, please call to schedule an appointment as soon as possible, as our appointment calendar fills up fast. Be sure to bring your completed checklist/worksheets and ALL documents with you as it is likely you will not be able to schedule a second appointment. If you are not prepared to furnish the information during your appointment you will be asked to use our Drop-Off service once you have a complete package.**

**The processing time for preparing and completing your tax return will be approx 7-10 business days from the date we have received "all" documents. Information/Paperwork received after April 1st may require an Extension.**

**WE CANNOT EMPHASIZE ENOUGH: Please review our checklist thoroughly so that you forward all the information required to complete your tax return at one time. Incomplete information or multiple packages will delay the completion of your tax return.**

**E-Filing is mandatory for returns prepared by a professional tax preparer, and we will need information from your VA driver's license to submit as proof of your identity. As we may have a copy from a previous year, many licenses have expired and we would like to update our files.**

**\*\* Extremely important: Please review the banking information that is being used for the direct deposit refund or payment withdrawal. Once the file has been executed within the e-file system, we cannot make any changes and it may result in a delay of receiving your refund. We will not accept bank account numbers over the telephone.**

**The completed tax return will be provided for your review. Once you receive your completed tax return, we request that you review the package and immediately contact us with any questions or concerns. Upon receiving your approval, we will provide you the e-file authorization forms to sign.**

**If your documents were sent electronically, an invoice for services rendered, tax return and e-file authorization forms for signatures will be sent electronically.**

**If you dropped off your paperwork, the Lobby is open for review, pickups, payments and signing with NO APPOINTMENT NECESSARY - HOURS for PICK-UP Monday, Tuesday, Thursday & Friday 10AM - 5PM**

**Your Tax Return Cannot Be Filed Until Your Signed Authorization Forms Are In Our Office!**

**We are looking forward to being of service to you again this year. We wish you all the best for a happy, healthy and prosperous 2025.**

*Sandy Blanton*

# FIRST CHOICE TAX SERVICE - TAX YEAR 2024

Full Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

Email Address: \_\_\_\_\_

## **PLEASE FILL OUT AND INCLUDE WITH YOUR DOCUMENTS/PAPERWORK**

There is a separate worksheet to be filled out if you are **Self-Employed(1099-NEC)** or have **Rental Property**  
A checklist will be provided upon your request or can be obtained on the website: **www.firstchoicetaxes.com**

- Copy of Driver's License for Taxpayer and Spouse (if not already on file or expired in 2024)
- Single       Married filing Jointly       Married filing Separately       Head of Household       Widow/Widower
- Any change to marital status?       NO       YES, please explain \_\_\_\_\_
- Identity Protection PIN, if one has been issued to you, your spouse, or your dependent by the IRS \_\_\_\_\_
- Any change to dependents?       NO       YES If yes, please explain \_\_\_\_\_
- Moved in 2024? If yes, Date moved: \_\_\_\_\_ Sold previous home?  Yes       No

### **BANK INFORMATION: \*\*\* If this box is not filled out a voucher will be provided to mail in balance due and any refund will be mailed by check to the address on file \*\*\***

Same as previous year  Yes       No      If no OR you are a NEW CLIENT please provide the following:

New Bank Information: Name of Bank: \_\_\_\_\_  Checking       Savings  
Bank Routing Number#: \_\_\_\_\_ Bank Account #: \_\_\_\_\_

REFUND - Direct Deposit?  YES       NO (have my refund sent by mail)

TAXES DUE - Deducted from bank account?  YES       NO, I will mail a check

ESTIMATED TAXES for 2025 - Deduct from bank account provided?  YES       NO

- Record of estimated federal tax payments (Form 1040-ES) and state tax payments (Form 760-ES)

Date Paid	Federal	State

NOTES FOR SANDY \_\_\_\_\_

## **NEW CLIENTS: PLEASE PROVIDE THE FOLLOWING**

Taxpayer Name: \_\_\_\_\_ DOB \_\_\_\_\_ Occupation \_\_\_\_\_

SS# \_\_\_\_\_  Full-Time Student       Legally Blind       Totally/Permanently Disabled

Spouse Name: \_\_\_\_\_ DOB \_\_\_\_\_ Occupation \_\_\_\_\_

SS# \_\_\_\_\_  Full-Time Student       Legally Blind       Totally/Permanently Disabled

Name (Last, First)	Soc Sec #	Date of Birth	(Son, Daughter, Parent, Etc)