CAA – TAXES – CONTACT INFORMATION – TAX YEAR 2024

Complete and Place in Envelope

Name **First:**		**MI:**	**Last:**	
School District:		**County:**		
What are the two best methods to contact you during this tax season?				
1 – Best **2 – Good**	**Contact Information**			
	Cell #:	**Best time(s) to call:**	**Can you send text messages?**	**Can you receive text messages?**
	Landline #	**Best time(s) to call:**		
	Email Address:			
	Mailing Address: **City:**		**State:**	**Zip:**

For Direct Deposit of your refund, please provide:

Bank Routing Number: _____ Bank Account Number: _____
Bank Name: _____ ___ Checking ____ Savings Account

If you owned a Health Savings Account (HSA) in 2024, please complete the below questions:

Was the HSA for single or family coverage? _____

Did you take an HSA distribution in 2024? If so, how was it used? (E.g., medical expenses)

If you took an IRA distribution before you were age 59 ½, how was the distribution used?

RECEIVE FINAL COPY OF TAX RETURN BY: _____

- Email
- Download (from GetYourRefund or FTP Link)
- US Postal Mail Service
- Pickup at CAA (Arrange with Reviewer)