

TAX PREP DROP OFF FORM

For most efficient tax preparation, please fill out form in its entirety and attach it to your original documents prior to submission.

Name(s): _____

Email address(es): _____

Phone(#'s): _____

Have you completed the Questionnaire on our secure client portal? (Y) or (N) _____

*****Please note that the questionnaire is required from all clients every year, even if everything is the same.**

How do you want to complete the questionnaire? Select option from list below.

- 1. Virtual Questionnaire sent via secure client portal (valid email is necessary)
- 2. Take packet home and return completed.
- 3. Complete in office yourself.

Prep process cannot begin until the questionnaire is received.

Any special information or changes we need to know for this tax year:
