



TAXPAYER FILES MUST INCLUDE:

- STATE ISSUED PICTURE ID OR DRIVER'S LICENSE
- COPY OF W2's, 1099, 1099G (if applicable)
- SS CARDS & PROOF OF HEALTH INSURANCE FOR TAXPAYER & DEPENDENTS
- COMPLETED CLIENT INFORMATION SHEET
- CONSENT TO USE FORM SIGNED BY TAXPAYER AND TAX PREPARER
- CONSENT TO DISCLOSE FORM SIGNED BY TAXPAYER AND TAX PREPARER
- SATISFYING DUE DILIGENCE THROUGH ADDITIONAL INFO (EITC)
- SATISFYING DUE DILIGENCE THROUGH ADDITIONAL INFO (SCHED C)
- PRINT OUT OF FORM 8867 INITIAL BY TAXPAYER & TAX PREPARER
- PRINT OUT OF FORM 1040 INITIAL BY TAXPAYER & TAX PREPARER
- PRINT OUT OF FORM 8879 SIGN BY TAX PREPARER (FOR INTERNAL FILE)
- REFUND ADVANTAGE FEE DISCLOSURE SIGNED BY TAXPAYER (FOR INTERNAL FILE)

In order for the tax preparer to receive compensation **ALL** of the above must be included in the taxpayer's file.

CLIENT NAME: _____ **LAST 4 DIGITS OF SS:** _____

HOW DID THE CLIENT HEAR OF OUR SERVICES?

- WALK-IN RECEIVED FLYER
- FACEBOOK INSTAGRAM
- WEBSITE MAILING

REFERRED BY: _____ (MUST BE COMPLETED FOR REFERRAL FEE)

PERSONAL CLIENT OF: _____

TAXPAYER'S SIGNATURE: _____

DATE: _____

I as the tax preparer certify by signing below I have verified ALL of the above required documents and this taxpayer's file is complete.

TAX PREPARER'S SIGNATURE: _____ **DATE:** _____