

Return Status Checklist

Name _____

Phone 1 _____ Phone 2 _____

Email 1 _____ Email 2 _____

Contacted Client for Additional Information

__ Tax Documents (1040 & Results) Sent (M/E/P) _____

__ Signature Forms (8879 & DD Verif) Sent (M/E/P) _____

__ Signature Forms Signed & Returned (M/E/P) _____

__ Invoice Sent (Mailed / Electronically / Pickup) _____

__ Invoice Paid (Check / CC / PayPal) Date Paid _____

__ Return Filed _____ Return Accepted _____

__ Return Rejected _____

__ Rejection Reason: _____

Completed Package Mailed to Client on _____