

COVERSHEET

Taxpayer Drop Off / Mail In

Taxpayer Name _____

Spouse Name _____

Taxpayer phone _____ Spouse phone _____

(where you would like us to call you when we are ready to schedule a virtual appointment to prepare your taxes)

Email address _____

Banking information _____ checking or savings?

(name of bank, routing #, account #) (for direct deposit of refund and direct debit for balance due to the IRS or CO)

First year I came to Smith Income Tax _____

My tax preparer last year was:

___ Amy Stone

___ Nancy Roulier

___ New Preparer

___ I do not care who prepares my return, I would like it as soon as possible

Please indicate your preference for signing your signature pages, retrieving your documents and making payments. In order to finalize and e-file your tax return, we must have your signed e-file signature pages and your fee for our services must be paid in full.

___ I/we would like to be contacted to **COME IN PERSON** to the Smith Income Tax office to sign/pick up and pay for our tax returns (both spouses must sign)

___ I/we would like to have you **MAIL** our signature pages with our completed tax return so we can **sign them at home and mail the originals back to the tax office with our payment for our tax prep. There is a \$15 additional fee for this option.**

___ I/we understand that Smith Income Tax must have our signature pages and our payment in full for their fees in order to e-file my tax return.

If you drop off or mail in, should we use email or a phone call to discuss your return(circle one)

Signed: _____

(at least one taxpayer must sign)