

TAX RETURN DROP OFF CHECKLIST

Drop Off Date: _____

Name: _____

Best Number to Contact: _____

Best time to Contact: _____

Email Address: _____

FOR TAX RETURN COMPLETION BY 4/15/2019
WITHOUT ADDITIONAL FEES THE LAST DAY TO
DROP OFF OR UPLOAD TO SMARTVAULT IS
MARCH 29, 2019

Check here if email changed in past year

Choose one option for your copy of your tax return:

- Tax Return available in my SmartVault Portal only (preferred choice)
- .PDF format on a flash drive (in addition to SmartVault copy)
- Paper copy (in addition to SmartVault copy)

I have included the following with this Drop Off:

YES NO N/A

- Signed Engagement Letter MANDATORY FOR US TO START WORK
- Completed Yes/No Questionnaire MANDATORY FOR US TO START WORK
- Completed Affordable Care Act Intake Form MANDATORY FOR US TO COMPLETE WORK
- Completed Tax Organizer
- ALL W2's and 1099's from any and all sources
- Mortgage Interest Statements
- Auto Registration (amount provided or statement provided)
- Additional Documents Uploaded to SmartVault Staff only: Date/Time Printed _____
- I want any refunds to be directly deposited
- My bank information is the same as last year

If not, (or you are a new client) direct deposit information is as follows:

Bank Name: _____

Bank Routing Number: _____

Account Number : _____

Checking

Savings

I understand that my tax return will be complete and ready for pick up ONE WEEK from the day I have supplied all information necessary to complete my tax return and that I WILL NOT BE CALLED WHEN MY TAX RETURN IS FINISHED.*

Signature: _____

* When your tax return appears in SmartVault, you know it is finished.