

## TAX RETURN DROP OFF CHECKLIST

FOR TAX RETURN COMPLETION BY 4/15/2020 WITHOUT ADDITIONAL FEES, THE LAST DAY TO DROP OFF OR UPLOAD TO SMARTVAULT IS MARCH 30, 2020

Drop Off Date: \_\_\_\_\_

Name: \_\_\_\_\_

Best Number to Contact: \_\_\_\_\_

Best time to Contact: \_\_\_\_\_

Email Address: \_\_\_\_\_

Check here if email changed in past year

Choose ONE option for your copy of your tax return:

.PDF format 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 Tax Organizer

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