



Welcome back! Please complete our short tax contact form so we can update our records

Taxpayer Name

Spouse Name

Address

Telephone

Email

Dependents you are claiming

Filing Status (circle one)

Single Married Joint Married Separate Head of HH Unsure

Point of contact

Perferred method of contact

How would you like to receive your return?

Paper

Electronic

Have you signed our current tax engagement letter?

Yes

No

Were you on the marketplace exchange for 2019?

Yes (please provide

1095)

No

**** A signed engagement letter is required each year before we will start preparing your return**

Notes/Comments