



## Individual Income Tax - Drop-Off Form

Date Received in mail: \_\_\_\_/\_\_\_\_/\_\_\_\_  Mailed  In Person

Client/s Name: \_\_\_\_\_

Best way to contact you: \_\_\_\_\_

Home: (    ) \_\_\_\_\_ Cell: (    ) \_\_\_\_\_

Business: (    ) \_\_\_\_\_

Best Time to Contact you: \_\_\_\_:\_\_\_\_ A.M. / P.M.

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

2017 Tax Return: How are you signing your tax return?

In Office                       Electronically (Portal)                       Mail

Notes:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Signature: \_\_\_\_\_

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**For Office Use Only:**

- Print Proforma and Demographic sheets
- Put appropriate Tax Packet in file
- Fill-out Instruction sheet (Name, Phone Number, Email + checkmark Drop-Off box)
- Write down any client notes
- Change CSM to "DROP-OFF DRAWER"
- Put file in BACK of Drop-Off drawer
- Put Orange sheet in Drop-Off Binder, alphabetically

Last Year's Preparer:  Marion       Jennifer       Essence       Marge

Information Received By: \_\_\_\_\_

Current Year's Preparer: \_\_\_\_\_

Signed Out: \_\_\_\_/\_\_\_\_/\_\_\_\_                      Completed: \_\_\_\_/\_\_\_\_/\_\_\_\_