

TAX RETURN CANNOT BE PREPARED WITHOUT COMPLETION OF THIS DOCUMENT

BUSINESS INFORMATION			
Business Name		Employer Identification Number <input type="checkbox"/> on file	
Business Mailing Address		City	State Zip
How would you like to be contacted? <input type="checkbox"/> Email <input type="checkbox"/> Phone <input type="checkbox"/> Text			
Best time to contact?			

BUSINESS OWNER INFORMATION <input type="checkbox"/> check if primary contact		BUSINESS OWNER INFORMATION <input type="checkbox"/> check if primary contact	
NAME (First, Initial, Last Name)		NAME (First, Initial, Last Name)	
SSN <input type="checkbox"/> on file	Date of Birth <input type="checkbox"/> on file	SSN <input type="checkbox"/> on file	Date of Birth <input type="checkbox"/> on file
Cell Phone	Alternative Phone	Cell Phone	Alternative Phone
Email Address		Email Address	
Ownership Percentage of Business <input type="checkbox"/> no change		Ownership Percentage of Business <input type="checkbox"/> no change	

PAYMENT IS REQUIRED PRIOR TO FILING	
We now offer Tax Audit Protection for your 1120 or 1065 (15% of tax prep fee), covering resolution of IRS and state tax notices, income tax audit defense, and tax identity theft (see brochure for details). Do you wish to opt out? <input type="checkbox"/> Yes <input type="checkbox"/> No	
How would you like to receive YOUR tax return copy?	
Save \$10 If you go Digital	<input type="checkbox"/> Digital (tax return & source documents via PDF) -- Can we shred your original tax documents? <input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Paper

Comments:

Insurance+Plus

Protecting your business is important to us and rising Insurance costs are a big challenge.

Let's see if we can better protect what you have built. Would you consider a free quote for Insurance?

- Yes, that would be helpful- email is a great way to contact me**
- Yes, that would be helpful- can I meet in person?**
- Not right now, thank you**

Thank you for your consideration.