

# **\*\*GREEN SHEET\*\***

## **MUST BE FILLED OUT**



### **IMPORTANT TAX RETURN SUBMISSION AND DELIVERY INFORMATION**

#### **RETURN THIS COMPLETED FORM WITH YOUR TAX INFORMATION**

☐ I am dropping my taxes off and do NOT have a scheduled appointment

I have a scheduled appointment with ☐ Jed Alexander ☐ Allison Boll-Fick ☐ Rick Siron ☐ Shelley Kehoe

Date: \_\_\_\_\_

Time: \_\_\_\_\_

☐ I am providing information for my personal taxes

☐ I am providing tax information for a business by the name of \_\_\_\_\_

To submit your tax information via ShareFile please email [ADMIN@PLANNERSTAX.COM](mailto:ADMIN@PLANNERSTAX.COM) and you will be provided with a secure link to upload your tax information.

#### **To sign my documents:**

☐ I prefer to sign my e-file forms and engagement letter electronically via DocuSign , where I can also download, save and print a copy of my tax return.

☐ I prefer to come into the office to sign my e-file forms and engagement letter

#### **To receive a copy of my tax return:**

☐ I would like a paper copy of my tax return

☐ I will download a PDF copy of my tax return via DocuSign

#### **When my taxes are completed:**

☐ shred my documents

☐ I will pick my documents up

To ensure we are sending your tax documents to the correct email address, please review and update the information below.

#### **Email Address (Please provide both taxpayer and spouse)**

Taxpayer	
Spouse	

Taxpayer signature:  Date:

Spouse signature:  Date:

The Planners recommends you retain copies of your tax returns indefinitely. However, in the event you misplace your electronic copy, we are happy to send you a copy free of charge. The Planners will retain an electronic copy of your tax return and source documents for seven (7) years.