

JEFFREY R WANGSGARD

AND ASSOCIATES LLC

EZ Drop-Off Program

Please feel free to use this form in addition to the tax organizer that fits your situation (Individual, S-Corp, Partnership, etc.) and drop them by our office or upload them to our portal. Please include your source documents. (Consult the first page of the Individual tax organizer for a list of possible forms to provide.) If you do not have a portal but would like one, please call our office 435-554-3166.

Name: _____

New Client Returning Client

Did you have any cash contributions for 2021? Y/N If yes, how much? _____

Did you receive the stimulus check? Y/N

If yes, how much did you receive around March 2021? _____

Did you receive Advance Child Tax Credit Payments? Y/N

If yes, how much? _____

For questions and to review my tax return, please contact me via:

15-minute appointment Email Phone Call

How would you like a copy of your return?

Hard Copy – To Pick Up Hard Copy – Mailed Electronic Copy – Portal Upload

If you will be receiving a refund this year, how would you like to receive it?

Check Direct Deposit -- Bank Information same as last year? Y/N

If not, please list.

Bank Name: _____

Routing Number: _____

Account Number: _____

We are excited to be working with you again this year!

jrwcptax.com

Phone: 435-554-3166

Fax: 435-465-2220

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