

JEFFREY R WANGSGARD

AND ASSOCIATES LLC

EZ Drop-Off Program

Name: _____

Do we have your Previous Year TR? Y N

Confirmed Phone Number? Yes No New: _____

Confirmed Email? Yes No New: _____

Confirmed Address? Yes No New: _____

Did you have any investments last year, like Bitcoin, Acorns, or Robinhood? Yes No

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

NEW CLIENTS NAME and DOB:

Email Phone Call

Signature Method:

E-sign In Person

How would you like a copy of your return?

Portal E-Mail Paper Mail

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? Yes No

If not, please list.

Bank Name: _____

Routing Number: _____

Account Number: _____

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