

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

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

15 minute in-office 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're excited to be working with you again this year!

jrwcptax.com

Phone: 435-554-3166

Fax: 435-465-2220

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