

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 portal access but would like it, please call our office 435-554-3166.

Name: _____

Phone Number: _____ Email Address: _____

New Client Returning Client

During 2022, did you have any investments, like Bitcoin, Acorns, or Robinhood? _____ Yes _____ No

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 Electronic Copy – Emailed Electronic Copy – Portal Upload
 Hard Copy – Mailed

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: _____

******Tax return preparation fees must be paid before returns will be filed.******

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

jrwcpatax.com

Phone: 435-554-3166

Fax: 435-465-2220

550 N Main, Ste 110

Logan, UT 84321