



## Individual Income Tax Clients

Date in: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Client(s) name: \_\_\_\_\_

Best way to contact you:

Phone: \_\_\_\_\_  
 Cell  Home  Business

Email: \_\_\_\_\_

Text: \_\_\_\_\_

Best time to contact you: \_\_\_\_: \_\_\_\_ A.M / P.M

Notes for Preparer: \_\_\_\_\_

### For Office Use Only:

In Person  Drop Box  Mailed  Portal / Fax / Email

Appointment date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Information received by: \_\_\_\_\_

Mail in date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Address info was mailed from: \_\_\_\_\_

Tax Season Address: \_\_\_\_\_

Last Year's Preparer:  Marion  Jennifer  Essence  Marge  CJ  New

Current Year's Preparer:  Marion  Jennifer  Essence  Marge  CJ

Preparer: Signed Out: \_\_\_\_ / \_\_\_\_ / \_\_\_\_  Add date to Scheduler  Update CSM