

TAX RETURN EMAIL CHECKLIST

(Keep in our file)

- ☐ Verify that the person requesting is Taxpayer/Spouse/Guardian
- ☐ Client knows/aware of the \$40 per year security fee for sending sensitive documents over the internet
- ☐ Specific Income Tax Returns requested (IE: 1040, 1120S, 1065)
- ☐ Specific Years Requested _____
- ☐ Verify if the email to be used for this document is the same email address that we have on file? (Leave blank if unsure)

IF NOT

- ☐ We will need the NEW email address: _____

ONLY AFTER

Client independently provides us with taxpayer/spouse social security numbers and birthdates

Date requested: _____

Date sent: _____