

We can not start the preparation of your return until we have received ALL information and all taxpayers have signed the engagement letter and completed the check list.

**Please complete:**

Address/Name Changes \_\_\_\_\_

Phone No. \_\_\_\_\_ Cell No. \_\_\_\_\_

Email Address \_\_\_\_\_

(Any newsletters we send out during the year will only be by email. Our privacy policy doesn't allow us to share your email address with anyone else)

What is your preference on how we contact you? \_\_\_\_\_

Will you be out of town or on vacation during the tax season? \_\_\_\_\_

Do you wish to receive the full organizer next year? Y/N

Do you wish to receive an email reminding of your estimates? Y/N/NA

Do you want your refund direct deposited? If yes, has your account changed from last year? If yes, please provide copy of a check or savings account deposit slip.

In order for us to provide or discuss your information with anyone we need a signed disclosure authorization. It is available on our website at [www.biwan CPA.com](http://www.biwan CPA.com) or from us.