



- Did you sign your Tax Return Engagement Letter?
- Did you sign your Consent to Use of Tax Return Form?
- Did you answer ALL of the questions on the Questionnaire?
- Did you review your Client Organizer Checklist to confirm the contact information we have on file is correct?
- Did you give us your new address, phone number, email address, updated bank account information, if applicable?
- Did you choose your delivery method on the Questionnaire?
- Did you gather ALL of your necessary tax documents?
- Did you remove all staples?
- If you are new to Exemplar, did you include the prior 2 years tax returns?