

Name: _____

Phone Number: _____

Email: _____

I monitor this email regularly

Preferred Advisor: _____ (cannot be guaranteed)

or First Available

Your advisor may contact you by phone and/or email

Please return this completed
page with your tax documents
to Integrity Tax Group

Copy of Tax Return (Choose ONE of the following two options)

I am aware that I will receive a digital copy of my tax return. *If no option is chosen, this will be the default choice.*

I agree to pay an additional \$25 to obtain a printed copy of my tax return.

Return of Documents

I understand that my documents will be shredded if not picked up by December 31, 2023. *This will be the default choice.*

The options below will help us if an extension is filed for you (Choose ONE)

I anticipate a balance due on my 2022 Tax Return to the IRS, and/or any applicable States/Cities.

I have had major changes to my tax situation in 2022.

Started taking IRA distributions, started a business, sold a home, withholding changes, marital status changes, income changes, new baby etc.

I anticipate a refund and have had no life changes that would knowingly affect this.

Additional notes for my advisor (more space available on back if needed):