

# IMPORTANT

Please be sure to read all the information in this package. Some items have changed from previous years, and I want you to be aware of them!

Before mailing back to me did you:

- Sign the engagement letter & Efile form(s)  
Return will not be processed without this!
- Complete Organizer
- Enclose all W2's, interest statements, stock sales, mortgage statements
- If a new client, did you enclose a copy of 2015 tax return
- If necessary, enclosed a voided check (If I don't have one already, or account changed)
- MA residents, enclose health insurance form
- Complete Health Insurance Questionnaire
- If I don't already have them, please enclose copy of dependents' birth certificate & social security cards. They will be shredded after scanning into my software.
- If NYS resident, include copy of NYS Driver's License of state ID card.