



## **2022 Client Tax Packet**

### **Enclosed in this mailing are the following forms:**

**Engagement Letter (blue sheet)** - Both taxpayer and spouse must sign, if applicable. I can NOT begin your return without this signed letter.

**Bank Information Form (yellow sheet)** - You MUST attach a voided check or statement from your bank that indicates the routing number and your account number unless you opt out of direct deposit/debit. The IRS requires us to obtain this information each year even if it hasn't changed. Both taxpayer and spouse must sign, if applicable.

**Demographic and Delivery Information (pink sheet)** - Please review the preprinted information for accuracy. Note any changes required.

**Mandatory Questions and Checklist (green sheet)** - Answer ALL the mandatory questions, review the lists of dependents (if any) and income items. Be sure to complete both sides of the sheet.

**Additional enclosures** - Depending on your situation, you may have additional enclosures that will require your attention.

**Organizer** - The organizer is available on my website - [www.jodeepaape.com](http://www.jodeepaape.com). You can also pick up an organizer at my office - 100 BridgePoint Drive, So St Paul or call and ask that I mail you one.

### **Next Steps:**

When you have completed the required forms and have most of your tax documents, you have several options to get them to me:

1. Upload in pdf format to your secure portal. Let me know if you need a portal set up for you. Please do NOT use regular email - it is not secure.
2. Mail everything to me (please keep a copy in case of lost mail)
3. Drop off at the office - beginning February 6th my tax season office hours will be 9 - 5, Monday through Saturday. I also have a secure drop box outside the office that you can use.

Contact Info:

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