Jodee Paape CPA

2024 Client Tax Packet

Enclosed in this mailing are the following forms:

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

Bank Information Form (green 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 (lilac sheet) - Please review the preprinted information for accuracy. Note any changes required.

Mandatory Questions (blue sheet) - Answer ALL the mandatory questions. I can NOT complete your return until these questions have been answered.

Checklist (yellow sheet) - Review and update the lists of dependents (if any) and income items listed.

Organizer - The organizer is included in this packet. It is also available as a fillable pdf on my website.

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

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 January 30 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 at any time – it is checked regularly.

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