



Now Serving 2 Locations! 763.999.4779
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Don't let April 15th sneak up on you!
Just follow these 3 simple steps and let us do the rest

1. Gather your tax documents (W-2s, 1099s, etc.).

****Be sure to bring a valid photo ID - even if we know you****
New Clients: Please bring copy of your last year's return

2. Fill out all of the forms in this packet. This includes:

- | | |
|-----------------------------------------------------|----------------------------------------------|
| <input type="checkbox"/> Taxpayer Information sheet | <input type="checkbox"/> Questionnaire sheet |
| <input type="checkbox"/> Banking information | <input type="checkbox"/> Engagement letter |

*****Additional forms to help gather your information are available on our website www.epamn.com. If we need anything more we will be sure to ask.**

3. Once you're ready you can deliver everything to us using any of the following methods:

- Secure online client portal
- Mail via USPS, UPS, FedEx, etc.
- Schedule an appointment to have your taxes completed while you wait
- Drop off in person, we'd love to see you!

We would like to inform you that due to the security & identity theft practices, new regulations and additional requirements imposed on us by the IRS, we have incurred additional costs and have to increase our tax preparation fees by 10-20%

Please contact us at 763.999.4779 or taxdept@epamn.com for the following:

- Appointments
- Secure Client Portal setup
- Forms & worksheets



**We are looking forward to working with you this tax season,
Jeanne, Corrie & Todd (Tax Preparers)
Melissa & Anna (Tax Assistants)**

Executive Public Accountants Inc.