

Tax Payer Compliance Checklist

(Must be turned in Completed to Manager for pay)

- Tax Payer Application
- Client Questionnaire
- Credit Agreement (*Credit Repair clients only*)
- Tax Summary
- Bill (*All who file HOH*)
- Copy of Birth Certificate (*All dependents*)
- Copy of ID/Drivers License
- Copy of Tax Payer Social Security Card (*print out from social office with number listed*)
- Copy of W2 or Income Documents

Additional Documents

- Schedule C Declaration
- Schedule A Declaration
- Debit Card Envelope
- Declaration Notarized form

Client Name: _____

Manager Signature: _____

Date: _____

Agent Code: _____

Agent Name Printed: _____