



## TAX CHECKLIST - CLIENT

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*Valley Tax Advisors CANNOT begin the process of preparing your tax return(s) without receipt of all of the below. Any delay in the completeness or our receipt of any of these important items could dramatically impact the timely completion of your tax return(s).*

*Have questions about this information? Never hesitate to contact us at 610-250-0862 x101 if you have any questions or need assistance of any kind!*

### **Engagement Letter**

*This is your contract with Valley Tax Advisors for the preparation of your tax return(s). Read it carefully! By signing and returning it to our office you accept the terms of the engagement.*

### **Form 8821**

*This form is used in the event that our professional staff need to obtain additional information from the IRS on your behalf.*

### **Tax Organizer**

*Completing a tax organizer is MANDATORY in order for us to prepare your tax returns – no exceptions. It is intended to identify where important changes in your life have occurred and possibly affect this year's tax filings.*

*Valley Tax Advisors will not accept your documents or begin the preparation of your return until a completed, signed tax organizer is received.*

### **Your Documents**

*We will only accept your documents through hard copy (mail or individual delivery), fax, or your secure client portal (preferred). All other media sources such as email, text, or photos will not be accepted. Keeping your data secure is our highest priority; this policy will be strictly enforced without exception. Not sure what documents you need? Refer to your tax organizer or the forms section of our [website](#) for a common list.*