

## **Tax Scan & Tax CD Service Signup**

Indicate the service desired below, sign, and fax/e-mail back to us. If scanning is required, we will await your documents to get started. Otherwise, we will start right away and have a CD ROM, invoice, and shredding release statement mailed to you within 2 weeks.

### ***Service Desired***

- Tax CD Service - we will copy the last 4 years of tax returns and associated source documents to a CD ROM and mail it to you. In some cases we may not have your last 4 years of tax returns, in which case we will advise you before hand and copy the years that we do have. Minimum charge for this service will be \$75.
  
- Tax Scan Service - we will scan documents provided by you and include where applicable, previously scanned documents that we already have. We will mail your CD back to you and wait for signed release to securely shred your original source documents. Minimum charge for this service will be \$125.

Yes, please provide me a CD ROM using the service indicated above.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date

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Income Taxes - Wealth Management