

Name: _____

- ☐ Multiple tax returns are enclosed with mine.
List names here:

- ☐ Business Tax Return is enclosed.

Please return this completed
page with your tax documents
to Integrity Tax Group.

Phone Number: _____

- ☐ Check here to opt OUT of texts from us (if not checked, acceptance is assumed). You may
reply "Stop" at any time to unenroll in texts.

Email: _____

- ☐ I monitor this email regularly.

*Your advisor may contact you by phone and/or email with information about your tax
return.*

2024 Tax Advisor

- ☐ First Available
- ☐ Preferred Advisor _____ (cannot be guaranteed) *By choosing this
option, I understand that the tax preparation process may take longer than in the past.*

Copy of Tax Return (Choose ONE of the following two options.)

- ☐ I am aware that I will receive a digital copy of my tax return. *If no option is chosen,
this will be the default choice.*
- ☐ I agree to pay an additional \$25 to obtain a printed copy of my tax return. *If you're
over 60 years old, there is no charge for a printed copy.*

Return of Documents

- ☐ I understand that my documents will be shredded if not picked up by December 31,
2025. *This will be the default choice.*

The options below will help us if an extension is filed for you.

- ☐ I anticipate a balance due on my 2024 Tax Return to the IRS, and/or any applicable
States/Cities.
- ☐ I anticipate a refund and have had no life changes that will knowingly affect this.
- ☐ I have had major changes to my tax situation in 2024.
Started taking IRA distributions, started a business, sold a home, withholding
changes, marital status changes, income changes, new baby, etc.

Additional notes for my advisor (More space is available on back if needed.):