

# Complete Tax Cover Sheet

Send via email to [service@completetax.com](mailto:service@completetax.com) if your email address allows you to send messages outside of your network. If not, forward the documents to [taxprepsupport@ccfi.com](mailto:taxprepsupport@ccfi.com).

Taxpayer Name: \_\_\_\_\_ Office EFIN: \_\_\_\_\_

Taxpayer Social: \_\_\_\_ - \_\_\_\_ - \_\_\_\_\_ Office Phone: \_\_\_\_\_

Is this a (Select One):

What year is this for (Circle one)?

Amendment ☐

2024 2023 2022 2021

Past year ☐

20\_\_\_\_ 2019 2018 2017

Did everyone have health insurance?

Yes ☐ No\*\* ☐

**If it's a return for tax year 2020 or 2021 you MUST include the Credit Addendum Form with this request. List the amount of stimulus received, even if it's \$0.**

If this is a <b>past year</b> return then please include:	If this is an <b>Amendment</b> return then please include:
A Completed Interview sheet*	Prior year tax return (Unless if the original return was completed by eBuzzTax/Complete Tax)
All of the taxpayer's original documents (W2, 1099, etc.)	Any form being added/changed on the return (W2, 1099, etc...)
The social security cards, ID/DL copy, and residency documents if claiming dependents for the year(s) they are filing	(optional) A separate page that includes the taxpayer's full itemized deductions claimed.
(optional) A separate page that includes the taxpayer's full itemized deductions claimed.	

If the taxpayer has paid rent, then you would need to include a separate page detailing the FULL landlord's name and address as well as the amount paid per month in order to claim rent credit.

\* Found on Complete Tax Training site under the reference tab

\*\* If you marked that not everyone had health insurance, then you will need to include a separate page detailing who did and did not have health insurance and for how long.

**All completed amendments and past year returns**  
**need to be signed and mailed by the customer**  
**to the IRS.**