Complete Tax

Prior Year Return Cover Sheet

Send via email to service@completetax.com alongside the needed forms, **if you cannot email outside of your office**, please forward to taxprepsupport@ccfi.com. Once the request is received by Complete Tax, a **$150** invoice email from Complete Tax will be sent to the client for payment. Complete Tax will begin working on the return once payment has been received. An email will be sent to the requesting address once the return is complete. Once tax returns are complete, you will be able to print the return from the Complete Tax home page by entering the taxpayers SSN and select the dropdown to Print [Year] Return.

Once the return is printed, the taxpayer will sign the Federal return and mail it, along with all W2's and any other income documents to the IRS. If a state return is required, the taxpayer will then sign and mail the state return with all W2's and any other income documents, and a signed copy of the federal return to the appropriate state address provided on the return. All signatures must be original wet signatures; copies are not accepted. Please note that the IRS only issues refunds for the previous three years. For any outstanding balances, penalties and interest will be added and continue to accrue until paid in full.

Taxpayer's Name:	
Taxpayer's SSN:	
Taxpayer's Email Address:	
Store Number:	
Store Phone Number:	

This coversheet is for PRIOR YEAR RETURNS only.

What year is this for? (Check one)

2024 ☐ **2023** ☐ **2022** ☐ **2021[1]** ☐ **2020[1]** ☐ **2019** ☐

Did anyone have health insurance through Marketplace.gov/Obamacare?

YES ☐ **NO** ☐

All Prior Year Returns must include the following:

- 1095-a form only if the taxpayer had Marketplace Insurance (Obamacare, marketplace.gov)
- Any applicable document on page 2, document guide sheet
- Interview sheets 2 completely filled out.

[1] 2020 and 2021 returns MUST include the Credit Addendum Form (found on the Complete Tax Training site under 'Reference') with this request. List the amount of stimulus received, even if it's $0.

[2] Found on the Complete Tax Training site under 'Reference'.

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Use this sheet as a guideline on what to include with a Prior Year Return Request.

DOCUMENTS MUST BE FOR YEAR BEING PREPARED

ALL Returns must have:

- Completed and signed Interview Sheet, plus page 4 for every dependent claimed
- Taxpayer Social Security Card, copy of photo ID
- Spouse Social Security Card and copy of photo ID (only if filing Jointly)
- Forms for any income being claimed (W2, 1099)

If Taxpayer is self employed:

- Proof of income received (1099 forms, receipts, invoices)
- Completed self employment statements from Complete Tax Knowledge Base
- Proof of any claimed expenses (Receipts, invoices, proof of purchase and use for business)OR proof of mileage (Mileage logs)

If Taxpayer is claiming dependents:

- Social Security Card for EVERY dependent claimed
- Birth Certificates showing relationship between Taxpayer and Dependent - (If dependent is nephew, we would need proof to show that the taxpayer is the sibling of the parent of the dependent)
- Page 4 of interview sheet for every dependent being claimed with all questions answers
- Proof of residency. Document MUST show address that's on the tax return, the dependents' names, and a reference to the tax year.

If Taxpayer is claiming Head of Household:

- Dependent information above
- Proof taxpayer pays for 51% or more of household expenses (Lease in Taxpayer's name, utility bills, mortgage)
- Proof dependents live with taxpayer for more than 51% of the year, residency documents must be for the year being filed.

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