



## **Tax Documentation Submission and Engagement Letter**

### **How to provide us with your tax documents, and what information to include:**

When you are ready to supply us with copies of your 2019 tax documents, be sure to let us know if your address, email or phone number has changed. Also, as part of the continued identity theft controls by the IRS and NY, we are required to enter your driver's license information on your tax return. If you renewed or acquired a new driver's license within the past year, please be sure to provide us with a copy of the front and back of your driver's license so we are sure to enter the most up-to-date identity information.

Here are the best ways to provide us with copies of your tax documents (retain the original documents for your records):

- Scan/email to anyone in our office.
- Fax to us at (845) 758-1297.
- Use Dropbox website.
- Mail copies.
- Drop your copies off in person. We have a lockbox on the front porch if you need to drop off before or after business hours.

### **When providing us with your tax documents, please also include the signed engagement letter.**

This engagement letter was included with our annual tax letter mailed earlier this month. If you have already provided us with your tax documents but did not include the engagement letter, you can find a copy of the engagement letter on our website:

[www.zulchtax.com/resources.html](http://www.zulchtax.com/resources.html)