



## When Your Tax Preparation Is Done...

Questions on this form?  
Please call (619) 220-0375  
and we'll be happy to help.  
Thanks!

Printed Name(s) \_\_\_\_\_

Please check all that apply (for your copy of your tax return):

- I prefer a digital, password-protected copy of my return (via email).
- I prefer a digital, non-passworded copy of my return via secure portal.
- I would like a printed, paper copy of my return.
- I will bring a flash drive to download a PDF copy of my return.

Please choose one (for your original source documents/tax papers):

- Please **mail** all of my paperwork to me via USPS Priority Mail. I understand that a charge of \$7.00 will be added to my preparation fee.
- Please **scan** all of my paperwork and send to me via a secure portal which I understand you will set up for this purpose. *(Please see note below).*
- I will **pick up** my materials after my taxes are filed. *(Please see note below).*

*I understand that if I do not pick up my tax materials **within one calendar month** of being notified that everything is ready to pick up, my documents will be scanned and uploaded to a secure portal.*

*I further understand that my original documents will be securely shredded upon uploading to a secure portal and that I will hold Fortunate Fields, Inc harmless for having destroyed my original documents.*

*If I determine that I cannot pick up my tax materials and do not wish them to be shredded, I will send \$7.00 to cover the cost of USPS Priority Mail before one calendar month has lapsed since being notified of their availability for pickup.*

\_\_\_\_\_  
Taxpayer Signature

\_\_\_\_\_  
Date

***Thank you for your understanding and cooperation.***