

**TAX RETURN
ROUTING SHEET**

WINDHAM SOLUTIONS

2018
Tax Year

STEVE M. WINDHAM, LLM, MBA, EA

Accounting & Taxation | Consulting | Education | Field Inspections | Photography

Client: _____ Tel: _____

Email: _____ New Tax Client: Yes No

Drop-Off / Pick-Up Location Visit (E)Mail-In Source: _____

TY2017 Fee: \$_____ TY2018 Fee: \$_____ CA FTB CSN: _____

Appointment: _____ Homeowner's Exemption: Yes No N/A

Return Appointment: _____ Disabled Veteran Exemption: Yes No N/A

CA Controller Unclaimed Property Available: Yes No N/A FATCA Requirement: Yes No N/A

Out-Of-State Purchases, Sales and Use Tax: Yes No N/A CA Renter's Credit: Yes No N/A

PDF Copy by: _____ On: _____ Signed Engagement Letter: Yes No N/A

Out-of-State Tax Return(s): _____ Local Tax: _____

Interview	Scan Documents	Input	Diagnostics	Review	Assemble & Sign	Exit Interview
Date	Date	Date	Date	Date	Date	Date

Special Instructions: _____

FBAR E-File Date: _____ FBAR E-Filed by: _____ FBAR BSA ID: _____

E-File Date: _____ E-Filed by: _____ US CA _____

E-Files Confirmed: US CA _____ E-File Confirmation Date(s): _____

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Notes: _____

This document may contain confidential client information. If found, please return to: Windham Solutions, PO Box 403, Elmira, CA 95625. Telephone: 707-635-3325. www.windhamsolutions.com.