



**HERITAGE TAX**  
Representation & Services

We have very limited tax preparation openings, and are selective in which clients we accept. Please complete all information and submit to the uploads section of our website, [heritageincometax.com](http://heritageincometax.com) using guest credentials (link is also provided [here](#)). Our office will respond within 48 hours of receipt in the portal. Email submissions will not be accepted.

**New Client Application – Tax Preparation**

1. Client Information – write in or type

Name:

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Email:

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Phone Number:

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*Check/circle all that apply:*

- I need a business tax return prepared
- I need a personal tax return prepared
- I need back taxes or multiple years of tax returns prepared

2. In a few words, why did you leave your former accountant/preparer? Write in or type