



Building Life Long Relationships

# STEPS TO SEND TAX DOCUMENTS

STEP 1



Make sure ID is Valid  
(picture/scan copy is acceptable)

STEP 2



Gather all forms/documents W-2'S,  
1098, 1099, 1095, Profit & Loss  
Statement, SCH K-1, etc.

STEP 3

**Taxpayer Questionnaire**

**PERSONAL INFORMATION**

**Primary Taxpayer**

First Name:	Last Name:	M.I.:
S.S.N.:	Birth date:	Taxpayer's PIN:
Home Phone:	Work Phone:	Cell Phone:
Occupation:	Dependent on another person? <input type="checkbox"/> Yes <input type="checkbox"/> No	Legally Blind? <input type="checkbox"/> Disabled? <input type="checkbox"/>
Email Address:	Text Message: <input type="checkbox"/> Yes <input type="checkbox"/> No	Cell Phone Carrier:

**Spouse**

First Name:	Last Name:	M.I.:
S.S.N.:	Birth date:	Taxpayer's PIN:
Home Phone:	Work Phone:	Cell Phone:
Occupation:	Dependent on another person? <input type="checkbox"/> Yes <input type="checkbox"/> No	Legally Blind? <input type="checkbox"/> Disabled? <input type="checkbox"/>

**Filing Status**

Fill out TaxPayer Questionnaire

STEP 4



Save & Send steps 1-3 attached via  
e-mail: [taxinfo@mynits.com](mailto:taxinfo@mynits.com) or  
Fax: 630 499-7810