

INCOME TAX PRODUCTS

2025

High-Quality Client Income Tax Products

>> HIGH-QUALITY

>> MULTIPLE STYLES

>> OFFICIAL ENVELOPES

Client Tax Organizer Tax Year _____

Please complete this Questionnaire before your appointment and bring the following:
• Last year's tax return (for clients only) • Three periods of earnings (1042-S, 1099, etc.)

1. Personal Information * Complete if you have loans, credit or phone bills; please contact the office if needed.									
Name (First, Initial, Last)		Social Security Number	Day or Night if Not if Overhead	Occupation	Driver's License Number				
Employer			<input type="checkbox"/>						
Home Address		City	State	Zip	Home Phone				
Employer E-mail Address				Cell Phone					
Spouse E-mail Address				Cell Phone					
Blind	<input type="checkbox"/>	Deaf	<input type="checkbox"/>	Married Status	<input type="checkbox"/>				
Disabled	<input type="checkbox"/>	Single	<input type="checkbox"/>	Widow	<input type="checkbox"/>				
Domestic Partnership	<input type="checkbox"/>	Married	<input type="checkbox"/>	Date of Decree	<input type="checkbox"/>				
	<input type="checkbox"/>	Single	<input type="checkbox"/>	Date of Spouse's Death	<input type="checkbox"/>				
	<input type="checkbox"/>	Married	<input type="checkbox"/>						

2. Dependents (Children & Others) Some tax credits and deductions are dependent upon the dependent's gross income. If the dependent's gross income exceeds the limit, the credit or deduction is reduced or eliminated.

Name (First, Initial, Last)	Relationship	Date of Birth	Social Security Number (Required)	Married Status	Widow	Dependent's Gross Income

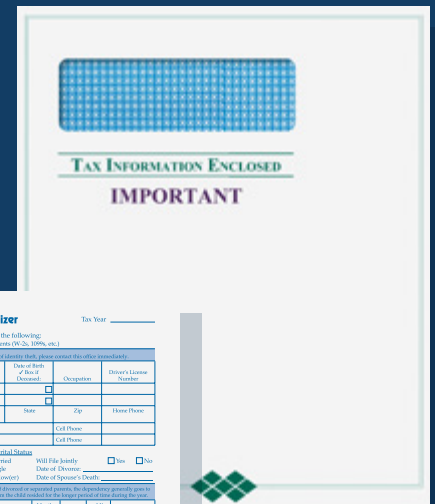
3. Medical Insurance Information (HSA)

☐ If you had coverage through a Government Marketplace. If so, provide the Marketplace ID number.
☐ If you are covered by a private health insurance plan, provide the Marketplace ID number.
☐ If you are covered by a private health insurance plan, provide the Marketplace ID number.

4. General Information

Are you self-employed or do you receive hobby income?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you receive any correspondence from the IRS or State tax agency?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you receive income from leasing animals or crops?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you gift a total of more than \$17,000 (cash or property) to any one person?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Did you receive rent from real estate, loans, or other property?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you have any debt forgiven or forgiven?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have an ownership interest in or signature authority over a foreign financial, bank or securities account?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Did you do any of the following:	
Have you provided to any person with whom you have or expect to have a business relationship a copy of your federal income tax return?	<input type="checkbox"/> Yes <input type="checkbox"/> No	12. Did you do any of the following:	
Did you make or receive gifts to/from a non-dependent alien or foreign entity?	<input type="checkbox"/> Yes <input type="checkbox"/> No	13. Did you do any of the following:	
Did you refinance your main home or other property?	<input type="checkbox"/> Yes <input type="checkbox"/> No	14. Did you do any of the following:	
Did you provide a loan for or help support anyone not listed in Section 2 above?	<input type="checkbox"/> Yes <input type="checkbox"/> No	15. Did you do any of the following:	

* Contact us for further instructions.
Information contained in this document was current as time of printing.



Federal Income Tax Envelopes

FEDERAL TAX RETURN ENVELOPES

- Official envelopes for filing tax returns with the IRS
- Addresses and processing centers shown here are correct at the time of printing.
If changes occur, your order will be automatically corrected before shipping.
- Minimum quantity of 50

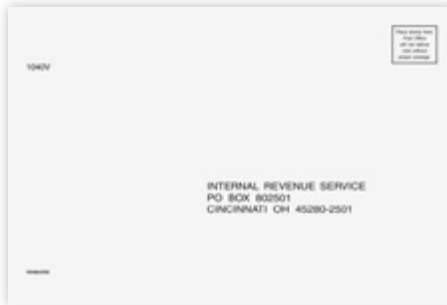
#10 Envelopes With Zip Code Extensions

	1040 Bal Due -0102	1040 Refund -0002
IRS Service Center	Item #	Item #
Austin, TX	FTXNB10	FTXRF10
Kansas City, MO	—	FMORF10
Ogden, UT	FUTNB10	FUTRF10



Envelopes With Zip Code Extensions

	1040-V #10	1040-V 6" x 9"
IRS Service Center	Item #	Item #
Cincinnati, OH	VOH210	VOH6210
Charlotte, NC (-1214)	VNC110	VNC6110
Louisville, KY	VKY110	VKY6110



Envelopes With Zip Code Extensions—3 7/8" x 8 7/8"

	1040-ES Payments
IRS Service Center	Item #
Charlotte, NC	ESNC110
Cincinnati, OH	ESOH210
Louisville, KY	ESKY110



Envelopes Without Zip Code Extensions

	#10	6" x 9"	9" x 12"
IRS Service Center	Item #	Item #	Item #
Kansas City, MO	4358	FMO610	FMO910
Austin, TX	4343	FTX610	FTX910
Ogden, UT	4364	FUT610	FUT910



Postcards

POSTCARDS

Reach your clients in a professional manner. Postcards offer an efficient and inexpensive way to keep your clients informed while keeping your business top-of-mind. Choose from multiple designs and messages.

- Size complies with USPS guidelines for First Class Mail postcard rate

A. #PC49 Tax Reminder - June 15

Message: Your second quarterly estimated payment is now due. When making your payment, be sure to note your social security number, the tax year and the words "Estimated Payment" on your check. If you have any questions about the amount you should pay or have had changes in your situation which require a revision of your original estimate, please don't hesitate to call for assistance.



A. PC49



B. PC50

B. #PC50 Tax Reminder - Sept. 15

Message: Your third quarterly estimated payment is now due. When making your payment, be sure to note your social security number, the tax year and the words "Estimated Payment" on your check. If you have any questions about the amount you should pay, or have had changes in your situation which require a revision of your original estimate, please don't hesitate to call for assistance.



C. PC51



D. CARD0414

C. #PC51 Tax Reminder - Jan. 15

Message: Your fourth quarterly estimated payment is now due. When making your payment, be sure to note your social security number, the tax year and the words "Estimated Payment" on your check. If you have any questions about the amount you should pay, if you need any year-end tax planning assistance or if you have had changes in your situation which require a revision of your original estimate, please don't hesitate to call for assistance.

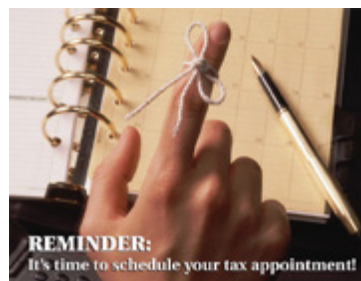
D. #CARD0414 Just A Reminder - Laser

- 4 perforated cards on an 8½" x 11" sheet

Message: Please call soon to set up an appointment. We look forward to serving your tax needs again this year.

E #5092 Tax Appointment Reminder

Message: It's tax time again! We're ready to help make it easy. Call us to set up an appointment.



E. 5092

Client Tax Envelopes

TAX RETURN ENVELOPES

Confidentially mail tax returns to your clients. The envelope windows align with virtually all 1040 forms. Add your return address on the flap for more efficient mailing process.

- 28# white wove stock
- Security tint
- Single cellophane window
- Flap opens on short edge
- 9 1/2" x 11 1/2"

Peel & Close Envelopes

Item	Item #	Description
A	80919	Important Tax Information
B	CLNT9PS10	First Class Envelope
C	CLNT9FPS10	Stars Envelope
D	80920	Stars & Stripes Envelope
E	80918	Patriotic Envelope

Moisture Seal Envelopes

Item	Item #	Description
A	CLNT9E10	Important Tax Information
B	CLNT910	First Class Envelope
C	CLNT9F10	Stars Envelope
D	CLNT9D10	Stars & Stripes Envelope
E	CLNT9P10	Patriotic Envelope



Peel & Close saves time spent on mail preparation.



A. **80919** Peel & Close
CLNT9E10 Moisture Seal



B. **CLNT9PS10** Peel & Close
CLNT910 Moisture Seal



C. **CLNT9FPS10** Peel & Close
CLNT9F10 Moisture Seal



D. **80920** Peel & Close
CLNT9D10 Moisture Seal



E. **80918** Peel & Close
CLNT9P10 Moisture Seal

General Use Envelopes

"IMPORTANT INFORMATION ENCLOSED" ENVELOPE

Use for mailing tax returns or other related information.

- 28# White Wove stock with black ink
- 10" x 13" landscape
- Peel & close flap opens on long edge

Item	Item #	Description
A	FLDENV10	Important Information Enclosed



A. FLDENV10



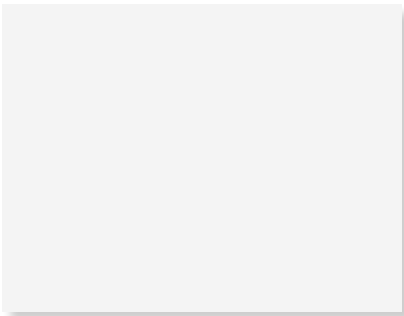
B. 2262

FIRST CLASS ENVELOPE

Use for mailing large tax returns and reports.

- 14# Tyvek stock with green ink
- 10" x 13" landscape
- Peel & close flap opens on short edge

Item	Item #	Description
B	2262	First Class Border



C. 80082

BLANK ENVELOPE

Perfect for mailing or storing virtually any document.

- 28# white wove stock
- 10" x 13"
- Moisture seal flap opens on short edge

Item	Item #	Description
C	80082	Blank

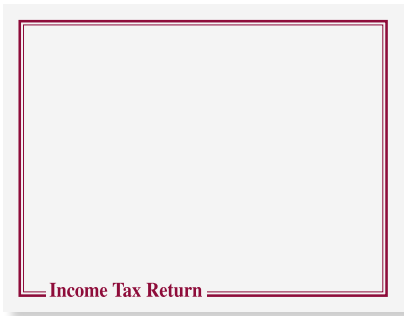
COORDINATING ENVELOPES

Deliver a complete, color-coordinated package with envelopes that match many of our folders. Ask for our Folders & Envelopes catalog for a complete listing of our folders.

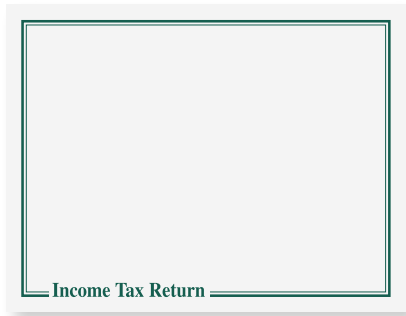
- 28# white wove stock
- 10" x 13" landscape
- Moisture seal flap opens on long edge

Item	Item #	Description
D	COMPENV310*	Burgundy Border
E	COMPENV410*	Green Border
F	COMPENV510*	Blue Border
G	COMPENV610*	Black Border

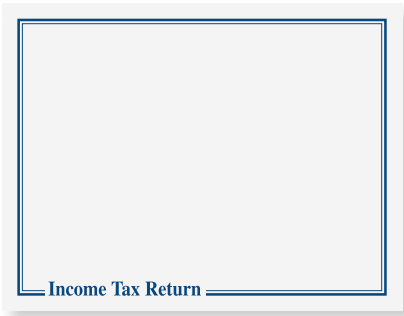
*Ensure immediate client recognition when you imprint your company name and address. Call for details.



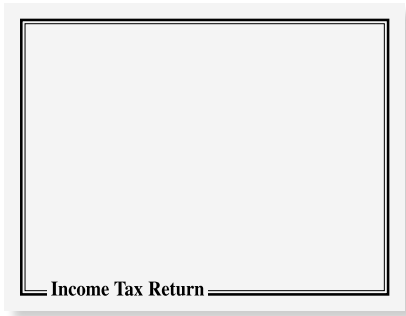
D. COMPENV310



E. COMPENV410



F. COMPENV510



G. COMPENV610

Client Organizer Envelopes

CLIENT ORGANIZER ENVELOPES

Get an at-a-glance view of your clients' tax return information with these handy envelopes.

Add the finishing touch by imprinting your name and address. Call for details.

- 28# white wove stock
- 9" x 12"

Includes
ACA
Requirements

Item	Item #	Description
A	TRSENV	Tax Record Saver Envelope
B	TXINSTENV	Tax Instruction Envelope
C	TAXENV10	Tax Record & Recipient Envelope

A. TRSENV

B. TXINSTENV

C. TAXENV10

RECORD-KEEPING ENVELOPES

Clients find these envelopes invaluable for storage of tax documents—they make finding information quick and easy.

- 28# white wove stock (unless noted)
- Flap opens on long edge
- Imprint your name for a more professional look. Call for details.

Item	Item #	Description
D	E046	9 1/2" x 12 5/8" Tax Organizer Envelope
E	E027*	4 3/4" x 11" Estimated Tax Payments Envelope
F	E047	9 1/2" x 12 5/8" Tax Return Envelope

*24# white wove stock

D. E046

E. E027

F. E047

Client Organizers

CLIENT RECORD-KEEPING BOOKLETS

Good records are the best protection you and your clients can have. A great client giveaway—keeps clients organized and coming back.

- 5 1/2" x 8 1/2" booklets
- Includes easy-to-understand client instructions
- Imprint your name to build your business identity

A. Auto, Travel and Business Expense Record

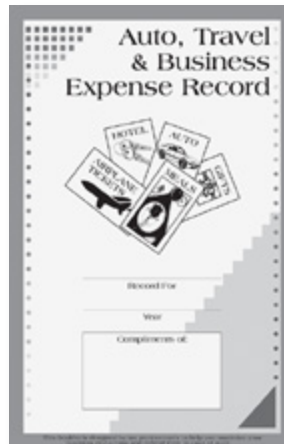
Tracks away-from-home expenses, entertainment and auto expenses. Consider giving a supply to local travel agents to pass out to their business travelers.

#A015

B. Schedule C – Income & Expense Record

Sections include: income record, cost of goods, operating expenses, auto & travel, office-in-home, annual income & expense summary, retirement plans, payroll reports and capital purchases.

#A021



A. A015



B. A021

Client Tax Organizers

1040 TAX APPOINTMENT ORGANIZERS

Three styles available for efficient information gathering. Includes ACA requirements.

- Sold flat or folded for convenient mailing

A. Appointment Organizers

For returns prepared by appointment or mail, & electronic returns

#A009 folded

#A009F flat (shown)

For returns prepared by appointment, includes appointment information—time, day and date

#A010G folded

#A010GF flat

For Returns prepared by mail

#A011 folded

#A011F flat

A. A009F

TAX ORGANIZER WORKSHEET

Get down to business at tax appointments when clients complete this 8 1/2" x 11" worksheet prior to meeting with you. Income, deduction, dependent and Affordable Care Act requirements are all captured in one convenient document.

B. Organizer Worksheet

#CLTTAXOR10

B. CLTTAXOR10

Tax Office Supplies

TAX INDEX TABS

Ideal for organizing tax returns, these index tabs are designed for use with letter-sized folders. Descriptions printed on one side of the tabs. Mix and match any of the tabs.

- 8½" x 11"
- Heavy, 90# white cover stock
- Each tab title sold separately

A. Filing Instructions

#TB101S Side-Staple

Position: 3

#TB101T Top-Staple

Position: 1

B. Federal Copy

#TB102S Side-Staple

Position: 4

#TB102T Top-Staple

Position: 2

C. State Copy

#TB103S Side-Staple

Position: 5

#TB103T Top-Staple

Position: 3

D. Estimates

#TB104S Side-Staple

Position: 3

#TB104T Top-Staple

Position: 1

E. City/Local

#TB105S Side-Staple

Position: 4

#TB105T Top-Staple

Position: 2

F. Other

#TB106S Side-Staple

Position: 5

#TB106T Top-Staple

Position: 3



Tax Office Supplies

REDI-TAGS®

Expedite tax preparation with these bright Redi-Tags that cut through the clutter and point to needed information.

Standard Redi-Tags

PLEASE SIGN,
& DATE

#8112414
Refill: #81124R14

PLEASE SIGN
& RETURN

#8134414
Refill: #81344R14

SIGN
HERE

#8102414
Refill: #81024R14

Tax Redi-Tags

MAIL THIS COPY TO THE
IRS
IN THE ENVELOPE PROVIDED

#CTIRSENV14

TAX POST-IT™ NOTES

Keep information organized during the tax preparation process. 50 sheets per pad.

FILING INSTRUCTIONS

Electronic Return

Enclose check for \$ _____

Refund due of \$ _____

Sign & date your federal return

State Return

Enclose check for \$ _____

Refund due of \$ _____

Sign & date your state return

Other instructions

Attach 1040 and any 1080s

Mail on or before:

April 15

Other _____

Did you sign your return?

Do you need to enclose a check?

#2237

PROCESSING CHECKLIST for an ELECTRONICALLY FILED RETURN

Client Name _____
Social Security Number _____
Cover Sheet _____
Date Tax Return was Received to Client _____

Completed

Prepare/Collect Tax Return Information

Verify Return for Electronic Filing

Notify W-2 Information

Enter the Tax Return

Complete Form 9401 or 9402

Place All Parties Sign Forms 9401

Transmit Tax Return

Receive IRS Acceptance

Send Form 9401 to IRS if Applicable

Place Form 1085

Deliver Form 9401 to Client

Comments _____

#1208214

TAX RETURN PROCESSING CHECKLIST

Tax Year _____

Client Name _____
Date Tax Return was Received to Client _____

Completion Date Initials

Interview _____

Write up/prepare _____

Review _____

Electronically Transmitted _____

Automatically acknowledged as Accepted _____

Automatically acknowledged as Rejected _____

Copy made _____

Assembled _____

Refiled/Client _____

Refill: By Mail ☐ Pick Up ☐

Comments _____

#1207614

MISSING TAX RETURN INFORMATION

Client Name _____ Preparer _____ Tax Year _____

This tax return is missing the following:

W-2 _____ Date Received _____ Date Refilled _____

1099 _____

Dependent's SSN _____

Business Mortgage Information _____

IRA Contribution _____

Child Care Provider Information _____

Improvements to Principal Residence _____

Cost of Investments Sold _____

Retirement Deductions _____

#1209014

Tax Office Supplies

TAX APPOINTMENT BOOKS

Next year’s appointment books are available now, when you need them. Begin scheduling without waiting for next year’s books to reach store shelves.

A. Universal Tax Appointment Booklet #B160

- Weekly, 7-day schedule: Monday through Saturday 8:00 AM to 9:45 PM, and Sunday 8:00 AM to 5:45 PM (15-minute increments)
- Use for 1 preparer for 3 tax seasons, or 3 preparers for 1 tax season with book tabbed in thirds
- Wire-bound, heavy-duty cover lays flat



A. B160

B. Multi-Preparer Tax Appointment Booklet #B161

- Daily appointment schedule; 8:00 AM to 9:45 PM (15-minute increments)
- Use for
 - 1-3 staff members (1 page per day)
 - 4-6 staff members (2 pages per day)
- Wire-bound, heavy-duty cover lays flat



B. B161

MISSING INFORMATION FORM WITH LINES

A real time saver!

- 8½" x 11"
- Two-part NCR
 - Client Copy (part 1 - white)
 - Accountant Copy (part 2 - yellow)

C. Missing Information Form #A073

A form titled "MISSING INFORMATION REQUIRED TO COMPLETE YOUR TAX RETURN". It includes a section for "RETURN TO:" with fields for NAME, ADDRESS, CITY, STATE, and ZIP. Below this is a section for "INFORMATION REQUIRED" with a large grid of lines for listing missing information.

C. A073