



Refer-a-Friend

***FREE e-file and Direct Deposit of your Tax Refund.
When Cygnet Tax prepares your Income Tax Return.**

Since your referrals are generally individuals you are well acquainted with you can be assured that your personal, financial and tax data will not be shared with them.
Please Fill out Form, Print and give to your Friend.

Preferred Cygnet Tax Client: _____

I am referring: _____
Address: _____
City, State, Zip Code: _____
E-Mail Address: _____
Home Phone #: _____
Cell Phone #: _____

Please Call for your appointment or drop-off service and provide the following documents

- Last years tax return.
- W-2's, 1099's and K-1 forms.
- All year-end lender loan statements, including those refinanced or paid off during the year.
- Settlement statements for properties bought or sold during the year.
- 1099 forms reporting stock sales for the year as well as the purchase dates & purchases prices.
- 1099 forms reporting Unemployment Compensation, Social Security Benefits, State Tax Refunds.
- Form 5498 reporting all IRA balances in accounts and from 1099 forms showing IRA withdrawals & rollovers. Social Security Numbers of all dependents not previously supplied.
- Is there anyone that will not be reported as a dependent this year & must be removed from your tax return? Let us know.

Cygnet Tax
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