



REQUIRED CLIENT INFORMATION

For Amended Tax Returns

Name		Tax Year(s) to be Amended	
Contact Information			
Email address #1		NOTE: Check your email (including SPAM / JUNK folders) during the preparation of your tax returns.	
Email address #2			
Phone number #1			
Phone number #2			
May we copy your First Command advisor on email correspondence? (If blank, default = yes) <input type="checkbox"/> YES <input type="checkbox"/> NO			
Are you (or do you work for) a First Command Advisor? <input type="checkbox"/> Advisor <input type="checkbox"/> Advisor Staff (including Gateway) <input type="checkbox"/> N/A			
STATUS UPDATE EMAILS are automatically generated and will be sent to all clients who provide an email address. We DO NOT call with status updates.			
Mailing Information			
Where do you want your completed returns mailed? If blank, default = Sender. SELECT ONE ONLY:			
<input type="checkbox"/> To my First Command Financial Advisor's Office			
<input type="checkbox"/> To my Home Address (the address on page 2 of this CTO). This is the address that will print on your tax return.			
<input type="checkbox"/> To an Alternate Address (if you're on an extended vacation, etc.):			
What mailing method would you like? NOTE: Be sure to notify Tax Services if you will be moving, going on vacation, or deploying prior to receiving your completed return(s). Discounts do not apply. SELECT ONE ONLY.			
<input type="checkbox"/> No charge – Regular U.S. Postal Service Mail. No tracking.			
<input type="checkbox"/> \$20 – Certified U.S. Mail, signature required (*) – U.S. addresses only; not available for military APO/DPO/FPO addresses.			
<input type="checkbox"/> \$30 – FedEx standard overnight service – Domestic and International addresses only; not available for P.O. Boxes or for military APO/DPO/FPO addresses. Packages will be left at the front door of the home. International shipments take up to five business days.			Note: Add \$10 if you live in Alaska or Hawaii, or have an international address.
<input type="checkbox"/> \$35 – FedEx standard overnight, signature required (*) – not available for P.O. Boxes or military APO/DPO/FPO addresses.			
(*) NOTE: if you select "signature required" and are not home to sign for the package, there will be a delay in the delivery.			
What format would you like? This is the copy you keep for your records. If left blank, default = secure email SELECT ONE ELECTRONIC VERSION AT NO CHARGE, OR SELECT TWO FORMATS FOR AN ADDITIONAL \$25 (in addition to the \$30 fee for a bound paper copy, if applicable). Discounts do not apply.			
<input type="checkbox"/> Secure email <input type="checkbox"/> PC CD <input type="checkbox"/> Mac CD		For all format options: Tax Services will mail the paper filing copies for the tax return(s) IAW the mailing instructions above.	
<input type="checkbox"/> Bound paper copy - \$30 FEE			
<input type="checkbox"/> Command Center upload – Note: Files uploaded to Command Center accounts are only accessible for 30 days.			

You can return the completed organizer and associated tax documents to your **First Command Advisor**, scan and email them to taxservices@firstcommand.com via either Command Center or via a secure email. Call 877-356-0399, option 1, for information on our SafeSend secure email portal, or you can fax your information to 877-272-2106 or 817-569-2185, or you may also mail hard copies directly to Tax Services at:
First Command Tax Services, 1 FirstComm Plaza, Fort Worth, TX 76109-4999
General Organizer questions – call 877-356-0399 option 1.

Name			
HOME ADDRESS			
PERSONAL INFORMATION		SAME AS PRIOR YEAR <input type="checkbox"/> (returning clients only)	
Name (Last, First, MI, Suffix) Maiden/Former Last Name Social security number Occupation Work phone/Extension Cell phone number E-mail address Date of Birth (mm/dd/yy)	TAXPAYER		SPOUSE
QUALIFIED DEPENDENTS		SAME AS PRIOR YEAR <input type="checkbox"/> (returning clients only) Note: be sure to complete information below on NEW dependents	
Qualified Dependents Full Name(s) (First name, middle initial, last name, suffix)		Social Security Number	Birth Date (mm/dd/yy)

AMENDED RETURNS REQUESTED – be sure to provide complete copies of the returns to be amended				
What amended return(s) do you want Tax Services to prepare?	Federal	State 1	State 2	State 3
	<input type="checkbox"/>			
What is the reason for the amendment? <input type="checkbox"/> IRS or State Notice received <input type="checkbox"/> Other reason (please explain):				

AMENDED RETURN PRICING		Subject to change. Contact Tax Services to confirm.	
Federal Form 1040X (if Tax Services prepared the original return)	\$230	Amended State Tax Return (if Tax Services prepared the original return)	\$145
Federal Form 1040X (if original return not prepared by Tax Services)	\$300	Amended State Tax Return (if original return not prepared by Tax Services)	\$200
AMENDED RETURN DISCOUNTS		Highest single qualifying discount applies.	
Professional Services/Tailored Professional Services Client (PS)	10%	This discount is for Professional Services/Tailored Professional clients who are not also returning Tax Services tax preparation clients.	
Loyalty	20%	This discount is for returning Tax Services tax preparation clients.	
Asset Management Solution Client (AMS/IMA)	20%	This discount is for current Asset Management Solution clients who are not also returning Tax Services tax preparation clients.	
Early Bird and PDF discounts do not apply to amended returns.			

PAYMENT OPTIONS OF TAX PREPARATION FEES

Sorry – We are not able to deduct tax preparation fees from any federal or state refund that you may receive.

Your name:

I want to pay my tax preparation fees by credit card. NOTE: we do not keep prior year information on file. We do not accept Discover Card.

Note: Please DO NOT provide your credit card information in this organizer.

Please call us at 877-356-0399 (option 1) with your credit card information. If you'd prefer that we contact you, please provide a contact number and a code word that we can reference when we call so that you can confirm our identity (to protect your information):

Preferred phone number:

Code word:

I want to pay my tax preparation fees by debit from my First Command Bank account.

NOTE: we cannot debit funds from a non-First Command Bank account.

First Command Bank Routing Number: **111993695**

First Command Bank only Account Number:

Name on Account:

Bill Me! NOTE: this option is for returning Tax Services tax preparation clients only.

NOTE: Tax preparation fees are typically charged/debited one business day after your completed tax return is mailed.

CANCELLATION POLICY

If the tax return has already been *even partially prepared (i.e. extension prep)*, and a client cancels the order, a flat fee of \$250 will be charged.

For returns that have been substantially completed but not yet been mailed, a flat fee of \$250 will be charged.

Tax Services does not issue refunds for tax returns that have been completed and shipped to the client or advisor.