



- ❖ TAX PREPARATION
- ❖ AUDIT REPRESENTATION
- ❖ TAX & RETIREMENT PLANNING
- ❖ NEW BUSINESS CONSULTING
- ❖ INTERNATIONAL MATTERS

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Driver's License Requirement for Tax Preparation

Dear Clients,

New York State has just informed the public and tax practitioners about a new requirement DUE TO RAMPANT IDENTITY THEFT.

In order to file your tax return, certain identification is now required, and this must be provided to your tax professional. If you do NOT provide it, your refunds will be held up, and tax return processing will be delayed. Please complete the following (separate page for your spouse if you are married) and return to us via the secure link.

CLIENT NAME _____

I have a Driver's License: License # _____ State _____

If your license is from NYS, also provide Document #: _____

I have a State Issued ID: ID # _____ State _____

If your ID is from NYS, also provide Document #: _____

Issue Date: _____

Document # is 10 character alpha-numeric code on bottom or back of NYS License or ID card.

Expiration Date: _____

I do NOT have a Driver's License or State-Issued ID.

Note: NYC ID cards are NOT State Issued ID.

ATTACH A COPY OF YOUR LICENSE. THANK YOU.