

STATE FINAL ACTION ITEM

- E-File Sheet: Sign on “your signature” line and “spouse signature” line if applicable. **PLEASE NOTE: DO NOT SIGN ON “ERO SIGNATURE” LINE.** Once signed, return the form to Welgaard.
- Payment Voucher: If there’s an amount due, a payment voucher will be included. After returning signed E-File sheets to Welgaard, mail payment with voucher to the IRS at the address listed on voucher.

Welgaard will E-File your return on your behalf. No additional action is needed once we receive the signed E-File sheet and you mail your payment to the IRS.

US FINAL ACTION ITEM

- Capitalization Policy: Sign on “Taxpayer signature” line if applicable and return to Welgaard.
- E-File Sheet: Sign on “your signature” and “spouse signature” if applicable, when required. **PLEASE NOTE: DO NOT SIGN ON “ERO SIGNATURE” LINE.** Once signed, return the form to Welgaard.
- Consent to Use: Sign and date the form and return to Welgaard.
- Invoice from Welgaard: Submit payment to Welgaard at your earliest convenience.
- Audit Protection Invoice from Welgaard: If you choose to enroll in the Audit Protection, submit payment with the invoice to Welgaard. This is an optional program offered for personal returns.
- Payment Voucher: If there’s an amount due, a payment voucher will be included. After returning signed E-File sheets to Welgaard, mail payment with voucher to the IRS at the address listed on voucher.
- Estimate Vouchers: If applicable, estimate vouchers will be included. The dates these need to be paid are printed on the voucher. After returning signed E-File sheets to Welgaard, mail payment with voucher to the IRS at the address listed on the voucher based on the dates on the vouchers.

Welgaard will E-File your return on your behalf. No additional action is needed once we receive the signed E-File sheet and you mail your payment to the IRS.

ENGAGEMENT LETTER ACTION ITEM

- Engagement Letter: If included, sign and initial where indicated. Engagement letters will vary based on your individual and business needs. Engagement letters for individuals may not require a signature.

PROMISSORY NOTE

- Promissory note: If included, sign and return promissory note to Welgaard.

MINUTES

- Minutes: If included, sign and return minutes to Welgaard.

All documents may be returned to Welgaard via NetClient, fax, mail, or dropped off at our office.