

TECHNOLOGY CHECKLIST

The most efficient way for us to review your return with you remotely, and still allow you to see the return before we file it, is through VIDEO CONFERENCING. To do this, we use a platform called “ZOOM” which is internet based. Please answer the following questions to help us assess whether or not you are able to “ZOOM” with us.

TECHNOLOGY

- Windows or Mac computer/laptop
- iPad or Windows tablet
- iPhone or Android smart phone
- N/A - I don't have access to a computer or smart device

INTERNET ACCESS

- I have a reliable internet connection
- I DO NOT have access to the internet

FAMILIARITY

- I have a ZOOM account/I have used ZOOM for virtual meetings/gatherings
- I have not used ZOOM, but am familiar with/have used other virtual meeting platforms
- I have never used ZOOM or any other virtual meeting platform
- N/A - I don't have access to a smart device

CONTACT INFO

Name (please print) _____ Phone _____

Email (please print legibly) _____

Key Phrase to help verify your identity (can be any word or phrase you choose)

Word or Phrase: _____