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Stephen W. DeFilippis, EA, Financial Adviser
Licensed to Represent Taxpayers Before the IRS

Member: Illinois Society of Enrolled Agents
National Association of Enrolled Agents

First Name: _____ Last Name: _____

This firm continuously strives to improve both the quality and variety of services we provide to our clients. We would greatly appreciate it if you would take the time to indicate on the enclosed questionnaire your reason(s) for not choosing us to prepare your 2018 income tax return. Please submit it to our office by email to admin@defilippisfinancial.com or fax to 630-668-2757.

1. _____ I would like you to prepare my 2018 income tax. I will call to schedule an appointment.
2. _____ I am not required to file a 2018 income tax return.
3. _____ I will be preparing my own 2018 income tax return. (Please check a. or b.)
 - a. _____ I will be using a computer to prepare my own return.
 - b. _____ I will be manually preparing my own return.
4. _____ A friend or relative will be preparing my 2018 income tax return.
5. _____ I have selected a different tax practitioner because (please indicate your reason):
 - a. _____ I moved out of the area.
 - b. _____ Your fees are too high.
 - c. _____ I am not comfortable sending my tax documents electronically or by carrier.
 - d. _____ I got married and used my spouse's tax practitioner.
 - e. _____ I was unhappy with your work.

Reason: _____

Additional Comments: _____

Revised: 10/26/2018

REGISTERED REPRESENTATIVE
» Cetera Financial Specialists LLC

INVESTMENT ADVISER REPRESENTATIVE
» Cetera Investment Advisers LLC