Software Purchase Assistance
Pre-Approval Application 2026-2027

Step 1 - Office and Owner Information

EFIN: _____ Business Name: _____

Office Physical Street Address: _____ City:_____ State:_____ Zip:_____

Office Phone: _____ Office Fax:_____
Office Email Address: _____

Owner Name: _____ Date of Birth:_____ SSN: _____

Owner Home Address: _____ City:_____ State:_____ Zip:_____

Step 2 - Prior Year Information

Prior year Tax Preparation Software: _____ Prior Year RT Provider:_____

Prior Year EFIN: _____ Number of RTs Processed in Prior Year: _____

Number of RTs Funded in Prior Year: _____ Number of Years in Business: _____

Step 3 - Cost, Signature and Submit

Total cost of Software / Amount to be Advanced: $_____

Owner Signature: _____

Date: _____