



Software Purchase Assistance Pre-Approval Application 2023-2024

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: _____