

Software Purchase Assistance Pre-Approval Application 2022-2023

////////////////////////////////////

STEP 1 - Office Information

Owner Name: _____ EFIN: _____

Business Name: _____

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

Phone: _____ Email: _____

STEP 2 – Cost of Software/Advance

Total Cost of Software/Amount to Advance: _____

Date: _____ Multi Year Request: _____

STEP 3 - Prior Year Information

Prior Year EFIN: _____ Prior Year Tax Preparation Software: _____
(If different than current EFIN)

Prior Year RT Provider: _____ Number of RTs Applied in Prior Year: _____

Number of RTs Funded in Prior Year: _____