

PRIOR TAXPAYER CALLING SHEET

Office #:	Tax Preparer Affiliate #:		Date	Date:			Page of		
Record result of all phone calls. Use the following to provide a reason if the Taxpayer isn't returning: A. Preparing Own Return B. Prepared by Competitor C. Not Filing This Year D. Prepared by Friend/Relative E. Other – Provide Reason Note whether an appointment was made, no answer, wrong #, voice mail, etc.									
Taxpayer Name	Phone Number	1 st Call	2 nd Call	А	В	С	D	E	
NOTES:									