



Office Certification Form

The office manager will oversee and confirm that each of these are done. Fax this form once it is complete.

Fax 678-807-5265

OFFICE INFORMATION	
Branch Number:	
Date Faxed:	
Manager Name:	
Manager Signature:	

COMPLETED	
<input type="checkbox"/>	All employees have renewed or obtained their 2022 PTIN (Instructions on ATS website)
<input type="checkbox"/>	Each employee doing taxes has finished their individual certification
<input type="checkbox"/>	Everyone knows their login information for the tax software and check printing
<input type="checkbox"/>	Everyone is comfortable with the tax software
<input type="checkbox"/>	Set goals and make a plan to reach those numbers
<input type="checkbox"/>	Partner with 6 businesses for taxes
<input type="checkbox"/>	Print and display training certificate for each employee after training has been completed
<input type="checkbox"/>	Ordered marketing materials from Sun Loan website (coupons, envelopes, and postcards)
<input type="checkbox"/>	Print Taxpayer Information Sheets and get Tax Envelopes ready to have them on hand to give out to prospective tax clients.
<input type="checkbox"/>	Tax banner and marketing materials displayed
<input type="checkbox"/>	Update store binder from ATS website under "Resources"
<input type="checkbox"/>	Talk to customer about tax services, promotions, and new products being offered (i.e. Tax Advance)