



# Software Purchase Assistance Pre-Approval Application 2021-2022

## 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: \_\_\_\_\_

## 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: \_\_\_\_\_