New TDN client

1. Set up client folder & F-2848, Power of Attorney
2. Print email that shows name & compensation.
3. Go to Clients/TDN Clients.
   1. Copy “1 – Template”
   2. Paste into TDN directory and rename as new client’s last name, first name
4. Open signed & unsigned F2848 attachments
   1. Print the unsigned to PDF
      1. Name it as “F2848, ” & First name Last name & “, Signed”.
      2. You can now close the original “Unsigned F 2848”
   2. Edit both PDF files (signed 2848 and newly created PDF)
   3. Copy signature from “Signed 2848” and paste into newly created PDF.
   4. Stamp my signature at the bottom.
   5. Add text field with the date of the signature in “signed 2848”.
   6. Add today’s date to my signature.
   7. Flatten the document and save it to the client’s folder/CIS & POA.
5. Create Client record in IRS Solutions.
6. Go to Clients, New Client