

2018 Referral Program

Terms and Conditions

- One referral payment per qualified referral.
- A qualified referred taxpayer and spouse must not have been a client of any Toro Taxes location in the immediately prior tax season.
- Referrals are qualified on the following Monday after an e-file acknowledgement from the IRS.
- Payments are issued via check from the location of service 12 to 21 days after IRS acknowledgement.
- The preparer of the return must be notified of the referral at the time of e-file to qualify for the above timeframe.
- Only a qualified referral partner is eligible to receive a referral payment.
- A referral partner may fail to qualify if they knowingly mislead an employee or preparer of Toro Taxes, or if they provide false information.
- A referral partner does not qualify to receive payment for his or her own return or a return they are listed as a dependent.
- A referral partner must provide at minimum their full legal name, a current mailing address, and a copy of a photo ID. Other requirements may apply for multiple referrals.
- Upon payment at or over \$600, a completed W-9 will be requested. For total payments of \$600 or more, a 1099-MISC will be reported to the IRS and sent to the referral partner.
- If both the referral partner and referred taxpayer cannot be reasonably identified, no referral payment will be issued.
- Other promotions or programs may exceed the referral program. Only one referral incentive will be paid per qualified referral.
- Toro Taxes employees and tax preparers do not qualify for the program.
- The referral program is active from the first official day of Federal e-file to the extended deadline, January 29, 2018 to October 15, 2018.
- Referral checks are void 90 days after issue. Payments must be claimed by December 31, 2018.

LOCATIONS NOT PARTICIPATING IN THE REFERRAL PROGRAM:

AZ1616 - 1616 EAST MAIN ST STE 105 MESA, AZ, 85203

CO1555 - 1555 South Havana Street Unit S" Aurora, CO, 80012

CA2560 - 2560 N Perris Blvd Venice, CA 90291

CA1503 - 1503 South Garey Ave. Pomona, CA 91766

CA2400 - 2400 E Florence Ave Huntington Park, CA 90255