



ROLE
CLIENT

Goals

My goals are:

- File my taxes quickly and easily.
- Get the biggest refund possible or minimize the amount owed.
- Spend no money on filing taxes.

External influences

- Car broke down on the way to work today.
- Recently returned from a fantastic, but expensive vacation.

Concerns

My concerns are:

- Tax Free! seems confusing.
- Don't know how Tax Free! gets to its results. Is it really getting me the best deal?
- It seems like I need to pay for some parts of Tax Free!