**TAX PREPARATION DO’S AND DON’TS**

**DO:**

* Submit all documents by March 19th 2025 or you may be put on an automatic

extension

* Fill out our Tax Questionnaire even if nothing has changed.
* Respond to all emails and phone calls thoroughly and promptly.
* Provide Accurate Contact Information and preferred method of contact
* Open all envelopes and removed all documents from the envelope\*\*
* Submit SSA annual Income Statement
* Submit all your documents at once. Incomplete returns will not be worked on

until all documents are received.

* Organize documents and review for accuracy and completeness\*\*
* Submit a year end statement from your Pharmacy
* Submit a 1098T & Billing Statement from the college/university your

dependent attends

* Include Death Certificates for deceased Taxpayers
* Include Birth Certificates for New Dependents and Social Security Cards
* Submit Summary of Property Taxes paid in 2024.
* Submit Summary of Charitable Donations
* Drop off your documents Monday-Saturday 9am – 6 pm. Place in Drop Box or

submit in Person at the Reception Desk. No need to call first.

* Submit your documents in a sealed envelope by March 19th 2025.
* Provide Closing Documents for any Property Sold
* Goodwill/Salvation Army Donation slips with date of donation, description and

value of donated items.

* Submit all W2G’s for Gambling Winnings along with a Statement from the

Casino with a listing of winnings.

* Submit Year End Consolidated Brokerage Statements (1099’s)
* Submit a Voided Check for all M & T Customers (formerly People’s Bank)
* Be prepared to pay for Tax Preparation when services are rendered.
* If submitting Medical Expenses, please provide us with a summarized total

each expense ie: Copays, Medical Equipment, Home Care Expenses,

Prescriptions (Pharmacies can provide a summary of paid co-pays)

**DON’T**

* Submit Prescription Receipt stubs
* Submit Monthly Brokerage Statements
* Submit Monthly Medicare Billing Statements
* Submit Blank Goodwill Slips
* Submit any large folders or attaché type holders unless you do not want them
* Submit copies of cancelled checks for Charitable Donations, please provide a

summarized total. Maintain the backup for your own records.

\*\* Additional fees may apply