

## TAX PREPARATION DO'S AND DON'TS

### DO:

- Submit all documents by March 19, 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 2022.
- 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 19, 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