

TAX PREPARATION DO'S AND DON'TS

DO:

- **Submit all documents by March 22nd 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 – 5 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 22, 2023.**
- **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**

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**