

Helpful Hints

- 1. REQUIRED: Driver's license number issue and expiration dates are a must for taxpayer and spouse. Returning clients, your information is in file unless you renewed after last year's appointment. Please give us your new issue date and expiration date.**
- 2. Open and dispose of envelopes. This would immensely speed prep time. Additional charge will be assessed if preparer has to do this.**
- 3. For non-cash charitable donations, the grand total (per donation) and short definition is all that is needed for tax prep but keep your list for your records. For example, "\$350 total of all items donated on June 1 to Good Will in three bags of clothes and one box of household items." Include the miles driven to deliver donation. VALUE MUST BE LISTED OR DEDUCTION WILL NOT BE ALLOWED.**
- 4. This office does not need to see all prescription or doctor receipts. For your privacy, total for each person and retain the receipts for your records.**
- 5. Review and check that all necessary information and forms are included to complete the tax returns. A thorough, accurate completion of information may reduce the cost to you regarding preparation of your income tax forms, reduce your income tax liability, and substantially reduce the possibility of an audit of your return. A reprint charge will be assessed if reprinting is not due to preparer's error.**
- 6. Please add additional sheets to give complete and detailed information on items claimed.**
- 7. Bring in all 1099s, W-2s, etc. that relate to taxable income or taxable deductions. The Internal Revenue Service requires that preparers have the originals of W-2 and 1099-R forms before filing returns. Please leave intact and preparer will return the client copy to you with your tax return. Preparer must have federal and state copies for file in the office.**
- 8. Any questions you have concerning an event you feel might have taxable consequences should be noted on the worksheets with full information as to the date of transaction, parties involved, money received or money expended.**
- 9. If there is a tax due, returns may still be filed early and the tax debt can be paid later.**
- 10. Returns should be signed and fees paid by April 1 to allow for electronic filing to be completed by due date. Preparation fees must be paid at signing; returns will not be filed until fees are paid.**
- 11. Did you receive any letters from the Federal or state taxing authorities within the last 12 months? If yes, please bring a copy with your other tax information.**

