10/16/18

INSTRUCTIONS FOR DROP OFFS

TELEPHONE INTERVIEW – Would you like to be in the comforts of your home during your tax interview? If spending time in our office causes you any inconvenience, you will want to read the following. Those of you, who have a scheduled appointment for your phone interview, please remember we will call you sometime after the time noted on your tax appointment letter. We will only start preparing your return on the time noted in your letter.

REQUIREMENTS:

1. On our web site http://www.mainstreettaxandaccounting.com go to the Worksheets & Forms section. Print and complete the following worksheets:
    - Income Tax Data Itemizer - We need you to complete the upper portion of the itemizer along with your dependents information, if applicable. Note any income or deduction items that are not included on your information forms i.e., W-2, 1099, 1098, etc. **Please note the best time for us to contact you.**
    - Client Questionnaire - please complete, sign and date the bottom of the last page.
    - Read, sign and date the Engagement Letter (if a joint return both spouses must sign and date). We cannot start your 2018 return without the engagement letter signed.
    - If you want your refund directly deposited or balance due automatically withdrawn we will need the Bank Verification form signed by all parties noted on the return. You will find this form on our web site.
    - 1099 Worksheet, if applicable – Business owners and Rental Real Estate owners. Please review the 1099 Instructions found on our website for changes this tax year.
2. Wait until you **KNOW** you have all your tax information organized and you received all your tax information forms (W-2, 1099, 1098, etc.). Don't forget your 401K statements.
3. Be sure to include a copy of your driver's license for anyone filing a tax return.
4. New clients: If you are a new client, we will need a copy of all your dependent's social security card and birth certificate.
5. New dependents for existing clients: We will need a copy of your dependent's social security card and birth certificate.
6. If you have any dependents under the age of 17 we will need school records, medical bills or any other documentation which shows the dependents name, the address where the dependent lives and the parental/guardian(s) name claiming the dependent/child on the document.
7. **Do you have health insurance coverage?** As we are preparing this document, we do not know what we will need related to your health insurance. If the mandate is the same as last year you will receive Form 1095 Health Insurance Coverage Statement from your employer, health insurance provider, or healthcare.gov on or before February 2, 2019. All individuals and family members you are claiming as an exemption on your income tax return and have health insurance will be listed on a Form 1095, so you might receive multiple 1095 forms. **We may not be able to complete your 2018 federal income tax return without your Form 1095. Please check our web site or call our office for updated information on this issue.**
8. **Include your last year to date payroll stub dated 2018 from each of your employers.**
9. If you would like your refund check directly deposited into your checking or savings account or if there is a balance due, **please complete and sign a bank verification form and include a photocopy of a blank check with your tax information** you drop off at our office. Please see #1 for more information on automatic deposit and withdrawal.
10. On or before March 15, 2019, mail or drop off at our office all the original 1099, 1098, K-1, W-2, and year to date payroll stubs along with any other information forms that you receive. **If you have health insurance coverage, include Form 1095 Health Insurance Coverage statement. Please do not forget to include the completed questionnaire, Income Tax Data Itemizer and signed engagement letter.**
11. If you mail us your information - For your own protection, before mailing, photocopy your information keeping the copies for your records. If you drop off your information, please be sure to note your name on the outside of your envelope. **Please let us know if you are planning a vacation or extended leave from home during tax season.** There is a mail slot in the storm door. The storm door is locked, so your items are secured. Someone is in the office 2/1/19 to 4/15/19 Monday through Friday 9:00 AM to 7:00 PM. On April 15, 2019 our office will close at 4:30PM. Denise is available 6 days a week **by appointment only.**
12. Upon receipt of your tax information, on a first come first served basis, we will complete a preliminary return. We will contact you and review your tax situation with you over the phone before finalizing your returns.
13. If you have detailed tax questions, please write them down. We will review your questions with you over the phone, or if you desire a tax appointment. If you need a tax appointment please call right away.

Those clients who already have an appointment and would prefer a phone/computer interview please send us an email or call the office. We will be more than happy to accommodate your request and call you on the same date and time of your scheduled appointment. We will review your tax return over the phone the same way we do when you are in our office.

In order to better serve you - If you are planning a vacation or extended trip away from home during tax season, please be sure to let us know. If you started a business, purchased or sold a rental property, and you did not discuss this with Denise please call our office and bring this change to our attention.