INSTRUCTIONS FOR CLIENTS WHO ARE DROPPING OFF TAX INFORMATION

Drop-Offs can be done via mail, by using our secure mail slot at our office entrance, in person or by email through Sharefile (call our office to request a secure link).

YOUR RETURN CANNOT BE STARTED UNTIL WE HAVE A COPY OF YOUR DRIVER'S LICENSE AND SIGNED TAX ENGAGEMENT LETTER (if a joint return both spouses/partners must sign and date). If you want your refund directly deposited into your checking account or balance due automatically withdrawn from your checking account, we will also need a BANK VERIFICATION FORM COMPLETED AND SIGNED BY ALL PARTIES NOTED ON THE RETURN.

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.
See the attached/enclosed Tax Appointment Checklist to help you gather information that will be needed to prepare your taxes.

REQUIREMENTS:

1. If we did not email you your worksheets, please go to our website https://www.mainstreettaxandaccounting.com and 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 dependent's 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.
    - Questionnaire - please complete (answer what you can; if you do not understand the question or are unsure on how to answer the question, please do not answer the question. We will review the questions together over the phone). Sign and date the bottom of the last page of the questionnaire.
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 year-end 401K statements. If you received unemployment compensation in 2024, please include your 1099G. Please review the tax appointment checklist.
3. Drop off your tax information **on or before March 7, 2025. Anyone dropping off after this deadline might be put on extension.**
4. Health Insurance – If you purchased health insurance through the Marketplace you will receive a Form 1095A. This form should be available on or before January 31, 2025. Go online to www.healthcare.gov to retrieve this form.
5. 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. There is a mail slot in the storm door. The storm door is locked, so your items are secure.
6. 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.
7. If you have detailed tax questions, please write them down so we can discuss your questions over the phone.
8. Someone is in the office 2/01/25 to 4/14/25 Monday through Friday 9:30 AM to 6:00 PM. On April 15, 2025 our office will close at 4:30 PM. Denise is available 6 days a week by appointment only.