TAX APPOINTMENT CHECKLIST

Please see the back of this checklist for Interview Processes

Just as a reminder, we cannot start your 2022 tax return without the following, if applicable**:**

- ☐ Signature(s) on the engagement letter along with all of your 2022 tax information: There should be a Tax Engagement Letter included with your packet. If not, you can print a tax engagement letter from our website (located under Worksheets & Forms). Both spouses/partners must read, sign and date the engagement letter.
- ☐ Driver's license: If a joint return we will need both party's driver's licenses.
- ☐ New clients: If you are a new client, we will need a copy of any dependent's social security card and birth certificate.
- ☐ New dependents for existing clients: We will need a copy of your new dependent's social security card and birth certificate.
- ☐ All dependents under the age of 17: We will need documentation such as school records, medical bills or any other document which shows your child's name, the address where the child lives and the parent(s) name claiming the child.
- ☐ If you want your refund directly deposited or balance due automatically withdrawn, we will need the Bank Verification Form signed by all parties noted on the return. If one was not included with your packet, you will find the Bank Verification Form on our website under Worksheets & Forms.
- ☐ Please remember to include your last YTD payroll stub(s) from each employer you had in 2022. Please be sure last payroll stub is dated 2022.
- ☐ 401K year-end statements and other retirement statements.
- ☐ If you have a rental property, business or hobby and paid anyone for services of $600.00 or more throughout 2022, you will need to submit Form 1099-NEC or Form 1099-MISC. If you would like us to complete your 1099 forms, please have the proper information in our office **by January 6, 2023.** Failure to file 1099's **by January 31, 2023** may incur a substantial penalty from the IRS for each 1099 that is not filed. Please visit our website and review the 1099 instruction sheet and worksheet.
- ☐ Business owners, landlords and certain employees: Please do not forget to log your odometer 12/31/22. Also, if applicable, do not forget to value your inventory on 12/31/22 using the actual cost you paid.
- ☐ If you purchased health insurance through the Marketplace, you will receive a Form 1095A. You might need to go online to www.healthcare.gov to retrieve this form. The IRS is telling us the Marketplace is required to send Form 1095A by January 31, 2023. We will not be able to complete your 2022 federal income tax return without your Form 1095A.
- ☐ If you do not have a face-to-face appointment, please complete the questionnaire found on our website under Worksheet & Forms.

OVER

Interview Processes

This year we will be using the same **Interview Processes** we have used in the past. Please review the processes below. If you would like to make a change on the type of appointment you had last year, please contact our office.

Telephone prescheduled appointment – This procedure is not new to those of you who drop off your tax information every year. This is probably the most popular way for most of our clients to schedule their tax interview. We will review, over the phone, the same questions and tax summary review we do during our in-person tax appointments. We do ask you complete the questionnaire, answering as many of the questions that you can. We need your tax information in our office before your scheduled appointment time. At your scheduled appointment time Denise will start to review and enter your tax documents (this takes ½ to 1 hour). She then will call you and complete the tax review.

At your scheduled appointment time Denise will start to review and enter your tax documents; for some individuals this will only take 15 minutes to 1/2 hour. For others, it could take up to 1 hour to 1-1/2 hours before she calls you to review your numbers. If you have more than (1) W-2 form along with other expenses and deductions, you will be looking at the 1-hour time span. Unfortunately, we do not know in advance what you will be sending us; trying to forecast the time Denise will call you is impossible. We will try our best to prewarn you as to when things will happen. Thank you for understanding if you receive a call earlier or later than what is noted above.

Person-to-Person – (In-Person appointment) – You come into the office at your prescheduled date and time, the interview is completed in the office.

Drop-off appointments – There really is no change to this process. If you decide you would like a prescheduled telephone interview you will need to call our office so we can schedule your appointment. Dropping off your information can be done through mail, our secure mail slot at our office entrance, or we can send you a secure link through Sharefile and you can upload your tax documents to us. If you chose to mail your tax information to us, please email or call our office so we are aware your information is being mailed.

Everyone needs to remember we can send you a secure Sharefile link for you to upload your tax documents to us. Please call our office if you would like us to send you a secure Sharefile link. You will need a printer and scanner to utilize the Sharefile link.

No matter which method you prefer, Denise will review your returns with you as she has always done in the past.

Completed tax returns can be mailed to you; you will be charged a $10 mailing fee. If you need help writing checks or would prefer someone to review with you your instruction sheets and the layout of your copy of the return, please schedule an appointment with Barb or Sarah.