

➤ **WELCOME BACK**

Since you have visited our office and been accepted into our Family. You have earned the Luxury of:

➤ **Online Filing.**

- No more fighting traffic
- No more juggling schedules to get your spouse to join you
- No more problems trying to get a baby sitter
- No more forgotten documents and repeat trips

Filing taxes from the comfort of your own home where you have

- Your family in a safe environment
- All your documents
- Tranquility
- The ability to video conference with your spouse and tax professional
- DocuSign option for you and your spouse to sign the tax return from different locations.
- Do this on the go from any location in the world.

➤ **Express Visit**

In a hurry and have tons of things to do?

Send us your documents 48 hours in advance and we will take care of the work.

We will schedule a Priority appointment. No Waiting Guaranteed regardless of how many people are in front of you! We will do a very efficient 5 minute review of the taxes and get you on your way to knocking out the thing on your to do list or to next big engagement!

Available both Online

Did your Family Unit Change ?

- Add or Remove a spouse (Bring us a picture ID and SS card)
- Had a new addition to the Family (SS Card and Birth Certificate)

➤ Document Requirements for Taxpayer and Spouse.

We must comply with Federal Regulations by having the following documents on file:

- ❖ Valid Original Driver's License or United States Passport
(No Photocopies or Expired Licenses will be Accepted)

- ❖ Original Social Security Card
(No Photocopies)

➤ Document Requirements for Dependents

In order to claim Dependents you must be able to prove family or legal relationship

- ❖ For Children up to 15 years of age
 - Original Social Security Card (No Photocopies)
 - Birth Certificate (No Photocopies)

- ❖ Dependents above 16 years of age
 - Valid Original Driver's License (No Photocopies)
 - Original Social Security Card (No Photocopies)



Income

It is essential to report **ALL SOURCES OF INCOME** to prevent an **AUDIT**.

- ❖ Form W-2 (**WE WILL NOT FILE TAXES WITH LAST PAYSTUBS**)
 - It is essential that you report W-2 forms no matter how small employment period or pay amount.
 - W2's CANNOT be added to a future year tax return.
 - Most Employers will issue these form by Feb. 1st or make them available online

- ❖ FORM 1099-G (**Unemployment Payments**)
 - Log into Website in which you claim unemployment weeks and download your 1099

- ❖ FORM 1099-INT (**Interest Payments Paid by Banks**)
 - Compensation received from opening an account or interest from monies on deposit.

- ❖ FORM 1099-DIV (**Dividends from Investments**)
 - Please provide us with a User ID and Password to import your trade information from your brokerage account.

- ❖ FORM 1099-R
(**Withdraws, Distributions, Rollovers of 401K or Retirements Plans**)
 - Loans against your 401k are not reported on a 1099R
 - All other transactions are reported on a 1099. If in doubt call your Retirement Plan administrator.

- ❖ FORM 1099 MISC (*Independent Contractors or Other Income*)
 - Income received from this form must be filed as a Business Return or a Schedule C on a personal return.
 - Provide PNL statement with Bank Statements (*If these documents are incomplete please schedule a bookkeeping appointment*)
 - Business Returns must be COMPLETED prior to Personal Returns.

- ❖ FORM 1099-B (*Provided by Agents of Investment Income*)

- ❖ FORM 1099-S (*Income from the Sale of Real Estate*)
 - ❖ Please call your title company to inquire if a 1099-S will be filed with the IRS

- ❖ FORM SSA-1099 (*Income received from Social Security Administration*)

- ❖ FORM 1099-G (*Income from the Government*)

- ❖ FORM 1099-K (*Income received from Merchant Services or Online Sales Example PayPal*)

- ❖ Schedule K-1 (*Income received from S Corps, LLC, Estates and Trusts*)

- ❖ W2-G (*Casino Winnings, Lottery, and Gambling Proceeds*)

- ❖ 1099-A (*Abandonment of Secured Property*)
 - Confirms that a property has been seized by bank or trust

➤ Cancellation of Debt. (1099 C)

❖ In today's tough economy more people are renegotiating their financial commitments.

- Have you gone thru a Home Foreclosure the bank may have “Forgiven” an outstanding remainder of your loan?

(Unfortunately this is reported as taxable income to you. Please call your Attorney or Loan Servicing Company and inquire if a 1099 C will be issued in your name)

- Have you been contacted by Creditors regarding an outstanding Credit Card Debt or Loan Amount?

Did they offer to negotiate the amount due on the loan as part of a settlement offer?

These Companies will file a 1099 C to report the difference between the amount of the original debt and the payoff amount as taxable income.

(Call the company whom you took your settlement and ask them to email or send you the 1099 form that was filed.)

➤ **Own a Home**

- ❖ Download Property Tax Bill from Tax Collector
- ❖ Download 1098 from Bank or Loan Servicing Company
- ❖ Receipts for Energy Efficiency Improvements

➤ **Child or Elderly Care**

(Did you pay for Dependent care in order to work or look for work?)

- ❖ Ask your Child or Adult Care provider to print or email you a receipt containing the following information
 - Provider Legal Name
 - Tax Identification Number or Social Security Number
 - Amount paid to provider in 2014

➤ **Adoption**

(Did you attempt or adopt a child in 2015)

- ❖ Adoption order
- ❖ Certificate of Hague Adoption
- ❖ IH-4 Visa

➤ **Charitable Donations of Money or Items to charities**

- ❖ Letters of Donations
- ❖ Receipts Organizations gave you for Donated Items

➤ **Purchased A New Energy Efficient Vehicle?**

- ❖ Scan Sales contract and registration for vehicle
- ❖ Scan receipt for charging station and installation

➤ **Educational Expenses**

- ❖ Form 1098-E (Student Loan Interest Paid)
- ❖ Form 1098-T (Fees Paid for Tuition)
- ❖ Endorsed Checks or Receipts showing payment of qualifying expense
- ❖ General Journal from Bursars Office verifying Enrollment status and paid tuition

➤ **Medical Expenses**

- ❖ Receipts or bills for medical and dental care
- ❖ Record of mileage driven for medical treatment
- ❖ Statements from HSA or MSA accounts

➤ **Unreimbursed Employee Expenses**

- ❖ Educator Expenses
- ❖ Unreimbursed work-related expenses
- ❖ Moving Expenses
- ❖ Legal Fees address work issues

➤ **Casualties and Thefts deduction**

(Eligible property damage resulting from a disaster, storm, fire, accident, vandalism or theft)

- ❖ Provide copy of Police Report
- ❖ Insurance Claim Forms
- ❖ Documentation verifying cost basis or fair market value used to calculate loss
- ❖ Appraiser report of value of loss

➤ Health Care Coverage

(If you purchased Obamacare thru the Health Care Exchange.)

- ❖ Please download 1095 A statement from your health care exchange account.

➤ Direct Deposit

(Tax return will be eligible for direct deposit by)

- ❖ Scanning a check from your personal account to ensure a rapid refund.
- ❖ **DO NOT** scan a deposit receipt
They contain information for internal banking purposes and is invalid for routing direct deposit!

➤ ARE YOU READY?

➤ Send us information (3 Ways to get your stuff to us)

1. Go to 4taxcash.weeverapps.com and upload info
2. Download our app from Google Play Store or Apple App Store, use your phone to take legible picture, and use the email link to send us the information.
3. Scan your documents into your PC and send via email to Docu@emailitin.com

➤ **Make an appointment (48 hours prior to your visit)**

1. Use the scheduling Feature on our APP to make your appointment
2. Use our Website to make your appointment.

➤ **Confirm your appointment**

- ❖ Scanning a check from your personal account to ensure a rapid refund.