SSTAR Services
4266 Gem Avenue
Castro Valley, CA. 94546

Phn:(510) 583-8035
Fax:(510) 583-0555
www.yourtaxreturn.com

Accounting and Tax Services

THE SHORT VERSION - PAGE 1

Read both sides, follow these instructions and we'll get along just fine ☺
<u>If you need a form you will find it on the web site under "Worksheets"</u>

What To Send...

1) Annual Client Worksheet - Pages 1 and 2 (for all) and Page 3 if you need it.
2) All W-2's, W2-G's, and K-1's 3) All 1098's (1098-C,-E,-I,-T, all of them)
4) All 1099's, all flavors - A, B, C, DIV, G, INT, M, OID, Q, R, S, SA, SSA) - **<u>except for</u>** 1099-NEC and 1099-K Income (See Item #5 Below)
5) Income and Expense Statement if you have 1099-NEC or 1099-K Income.
6) HSA Distribution Forms 7) Income and Expense for each Rental Property
8) Uber / Lyft / Doordash worksheet if you have that kind of income
9) Property ***<u>SALE</u>*** Documents (1099-B or S, HUD-1 only 2-3 pages max)
10) Investment **<u>TAX</u>** Documents (realized gains / losses on stock sales)
11) Health Care Coverage 1095-A and CA 3895 **<u>but NOT 1095-B or 1095-C</u>**

What NOT To Send...

1) Health Care Coverage 1095-B or 1095-C
2) Any 1099-NEC or 1099-K by itself (See Item #5 Above). These must also have the correct Income and Expense statement (from the web site)
3) Multiple Copies of the Same Form **<u>4) Any kind of bill or receipt</u>**
5) Bank Statements, Child Care Statements, Charity Receipts, or anything that says "statement" or "receipt" - it's NOT a tax form. Goes on the worksheet(s).
6) Pages with ONLY text content (no numbers - just instructions, etc)
7) Refinance Papers or Property *PURCHASE* Documents
8) Property Tax Bills or DMV Forms (those amounts go on ACW Page 3)
9) Form 5498 - What's in your retirement has no impact on your tax return
10) Your kid's tax documents (except for dependent's 1098-T) - if they have interest / dividend income under their SSN it goes on THEIR return NOT yours.
11) This Worksheet, My Intro Letter, etc... ☺

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THE SHORT VERSION - PAGE 2

How to Send It:

E-Mail - Do NOT use 3rd-party web sites, I won't download from them. Avoid ZIP files. Send each return in one e-mail (3 returns, 3 separate e-mails). Send files as attachments NOT embedded in the body of the e-mail. Delete blank pages, duplicate forms, and text-only pages.

Taking pictures with your camera? Use Adobe Scan (or any other free scanner app) which makes PDF's that are 10 times better quality than the JPG files. If you send unedited JPG's I will ask you to re-send them using an app. Just taking a picture and converting it to PDF does NOT work it still looks horrible.

Send each tax return in a separate fax, e-mail, or attachment, with its own annual client worksheet as the first document. Do NOT combine the tax forms of others (kids, dependents, etc) with your tax forms unless my worksheets say to do that.

Send all returns that interact (who gets the dependent? who gets the college credit?) **at the same time.** Otherwise taxpayer "A" may claim a dependent and save $2000 - when taxpayer "B" could have claimed the same and saved $4000.

Fax - Please use FINE transmission mode so I can actually read the numbers. Fax to 510 583 0555. Fax is on 24/7. I will call the next day to confirm receipt.

By Mail - Send everything in a large 9 x 12 envelope with all papers opened and unfolded. Do NOT require a signature, I may NOT be here to sign for it.

Drop Off - Do NOT call ahead. If I am here, hand your documents directly to me. If I am not here, drop everything in the locked drop box on the front steps. Place everything OPENED and UNFOLDED in a LARGE (9 x 12) envelope - I don't want to spend 24 hours of my season (3 minutes per return) opening and unfolding a bunch of scrunched-up tax forms.

Stacy Spink, SSTAR Services