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Accounting and Tax Services

The Basics About Sending Me Your Tax Information & Forms (Yes, this applies to everyone!)

Fill out all forms completely. If it applies to you, make an entry. If not, leave it blank. Filling out the worksheets as completely as possible makes for faster and more accurate data entry of your information.

If you need a worksheet not present in this mailing (Income and Expense statement for a business, Uber/Lyft, Doordash/Instacart, or a rental property) download it from my web site. **All forms are fill-in PDF - download, save, type info, save again, send it to me. No need to print at all.** If you are using an Apple device, make sure the font is large and readable.

Please read the "**Send Me / Don't Send Me**" checklist and follow it. I will charge addl $ for any time my staff wastes on stuff I say not to send me.

Drop Off - Open all your mail and unfold all of your tax forms. Do NOT call ahead. If I am here, hand me your papers. If I am not here, put it in the drop box. Do NOT use the box when I am home. **NO STAPLES.** They really slow me down. Paper clips, binder clips, maple syrup. and chewing gum are OK ☺ - but **NOT** staples. **OPEN** and **UNFOLD** your tax documents and put them in a large envelope.

E-Mail - follow the directions on "How To Send It" on page 1.

OK, ready ... let's get this done!

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 1099-NEC and 1099-K</u>**. If you have these, **<u>do NOT send them</u>** - send the correct Income and Expense statement (download from my web site).
5) HSA Distribution Forms 6) Income and Expense for each Rental Property
7) Uber / Lyft / Doordash worksheet if you have that kind of income
8) Property ***<u>SALE</u>*** Documents (Closing Statement or HUD-1, 2-3 pages max)
9) Investment **<u>TAX</u>** Documents (realized gains / losses on stock sales). If you sold stock with no basis (sales codes B, C, E, of F) you need to provide that info.
10) Health Care Coverage 1095-A and CA 3895 **<u>but NOT 1095-B or 1095-C</u>**

What NOT To Send...

1) <u>Any 1099-NEC or 1099-K</u> (See Item #4 Above). **2)** Health Care Coverage 1095-B or 1095-C (see Item #10 Above). **3)** Forms 3921, 3922 or 5498
4) Multiple Copies of the Same Form **5)** Bank Statements, Child Care Bills, Donations, or anything that says "Bill" or "Statement" - this type of information goes on the Annual Client Worksheet. **6)** Property Tax Bills or DMV Forms.
8) Refinance Papers or Property PURCHASE Documents (See Item #8 Above).
9) Pages with only text or zeroes.
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... ☺. I am familiar with these items.

THE SHORT VERSION - PAGE 2

How to Send It:

E-Mail - Do NOT use 3rd-party web sites, I won't download from them. **No ZIP files.** <u>Send files as attachments NOT embedded in the body of the e-mail.</u> Delete blank pages, duplicate forms, and text-only pages. It helps if you group the same type of tax forms together (W-2's, 1099-INT's, 1098's) in your e-mail.

Taking pictures with your camera? <u>**DON'T**</u>. 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. <u>Just taking a picture and converting it to PDF does NOT work.</u>

<u>**Send each tax return in a separate fax, e-mail, or attachment, with its own annual client worksheet as the first document**</u>. Do <u>**not**</u> combine tax forms from different tax years or different taxpayers (kids, dependents, etc) unless my worksheets say to do that (such as the 1098-T form for dependents).

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 <u>OPENED</u> and <u>UNFOLDED</u> in a <u>LARGE</u> (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