142 Linkwood Rd, NW
Atlanta, GA 30311
770-368-1951 (phone)
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We are ready to talk taxes!

WHAT'S NEW & IMPORTANT DATES:

- **Due to COVID-19, appointment times are reduced (more details when we speak/email)**
- **First date available to prepare your tax return is February 1st**
- **$25 fee increase this year**
- **Last date to mail in, email or drop off your tax documents is March 31st**
- **Last appointment date is April 14th**
- **Any economic impact payments you received are not taxable for federal income tax purposes, but they reduce your recovery rebate credit.**
- **You can take a charitable deduction for cash contributions, even if you don't itemize**
- **Office will close the day after Holidays & November 15, 2022 – January 9, 2023**

The tax organizer.xls contains separate worksheets: Checklist, Self-employed business, Rental property, Medical expenses, Unreimbursed job expenses or Clergy activity. The most used are attached in pdf. Fields in the "TAXPAYER INFORMATION" section can be completed using "SALY" same as last year. **We must have a signed checklist before we file your income tax return**. Please take a moment to print it now and use it as a checklist for your tax documents as they come in.

Make certain to review your receipts, canceled checks, credit card statements and bank statements for possible tax deductions. Include all documents received in envelopes marked "IMPORTANT TAX INFORMATION". We encourage you to use the tax organizer to ensure complete documents are provided to us to prepare your tax return and to reduce the time your data is in our office.

Remember payment is due at time of service. A $150 deposit may be required when delivering tax information to us, call our office for more details. We will continue to enforce the 10% late payment account service fees and additional fees for multiple requests to get missing tax information, duplicate copies of prior year tax returns, summarizing tax data not on organizer, etc.

Your business is always appreciated. It is our pleasure to continue to provide exceptional services to you. Please tell a friend and receive a **$25.00 discount** on next year's tax preparation fees.

If mailing your tax documents, please use our home office located at **142 Linkwood Rd NW, Atlanta, GA 30311**. For drop offs use our secured mailbox at the street.

The IRS recommends that you should keep copies of your prior-year tax returns for at least three years.

Thank you

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TAXPAYER INFORMATION (Information must match Social Security Card)

				Birth Date	Student Class (form 1098T)	Edu: Books & Supplies	Marketplace Health Ins (1095 A)
Name:		Occupation:			/	$	
Spouse:		Occupation:			/	$	

Phone Numbers: (Day) ______ (Evening) ______ (Cell) ______

Mailing Address: ______ County: ______

Contact's email address: ______ Date Moved: ______

Marital Status on 12/31: (S, HH, MJF, MFS, QW) ______ # of Months lived with spouse this year (12 or less): ______

DEPENDENTS (Information must match Social Security Card)

***** Provide proof of residence for each*****

	Name: (first and last)	Social Security #	Birth Date:	Months lived with you (1-12)	**	Income	Dependent / Child Care	College year enrolled (form 1098T)	Education: Books and Supplies	**Advance Child Tax Credit**
1						$	$	/	$	$
2						$	$	/	$	$
3						$	$	/	$	$
4						$	$	/	$	$
5						$	$	/	$	$

☐ Form 8332 for noncustodial parent, signed by custodial parent

**Relationship: (S) Son, (D) Daughter, (R) Relative, (O) Other

Virtual Currency (receive, sell, send, exchange, or otherwise acquire) (Circle One) YES / NO

INCOME √ If received - Must include documentation

☐ W-2 (Housing Allowance - see worksheet) DCB ______
☐ Interest / Dividend (1099 INT / 1099 DIV) Foreign taxes ______
☐ IRA / Pension Distribution (1099R) Used for ______
☐ Social Security Benefits (1099 SSA)
☐ Stock Sales (1099 B) Provide purchase date and cost amount
☐ Alimony Received
☐ Business / rental activity 1099 NEC, MISC, K (see worksheet)
☐ Schedule K-1
☐ Unemployment Compensation (1099 G)
☐ Gambling / Lottery Winnings (W-2 G)
☐ Other: Jury Duty Pay / Prizes / Barter / 1099 A,C,Q

ADJUSTMENTS TO INCOME √ If paid - Must include documentation

☐ Educator Expenses (include PPE, disinfectants & other supplies to prevent COVID)
☐ Self Employed Health Insurance Premiums / HSA (1099 SA)
☐ Moving Expenses (Military only)
☐ Alimony Paid to: SS# ______$ ______
☐ IRA / ROTH / SEP / Simple Contributions
☐ Student Loan Interest (1098 E)

ITEMIZED DEDUCTIONS √ If paid - Must include documentation

☐ Medical & Dental (paid out of pocket only) **(see worksheet)**
☐ Real Estate Taxes (1098 or Tax statement)
☐ Vehicle Registration (taxes only)
☐ Mortgage Interest / Points / MIP (1098)
☐ Investment Interest
☐ Charitable Contributions (Cash / check)
☐ Charitable Contributions (Non Cash) **List items given**
☐ Gambling (Lottery) losses / Casualty (theft) Losses
☐ Purchase, Refi or Sold home (Provide settlement statement)

Miles Driven: Medical ______ Charitable ______

OTHER TAXES AND CREDITS

☐ First Time Homebuyer Repayment Program (@ $500/yr)

Economic Impact Payments Received (Stimulus) **3rd $** ______

Direct Deposit Information: Routing Transit #: ______ Depositor Account #: ______

Type of Account (Circle one): Checking / Savings

Do you owe IRS, State Govt, Student Loans, Child Support? (Circle One) YES / NO Payments for prior taxes: IRS $ ______ State $ ______

Did you receive any letters/notices? (Circle One) YES / NO **Refunds received: Federal? (Circle One) YES / NO State? (Circle One) YES / NO**

☐ Copy of last 2 tax return filed (new clients only) Referred By: ______ (new clients only)

QUESTIONS / CONCERNS YOU HAVE: ______

SPECIAL CIRCUMSTANCE: ______

By signature below, I acknowledge that the enclosed information is correct and includes all income and expenditures necessary for preparing my tax return. I authorize my practitioner at Aa Services & Consulting to generate my PIN as my electronic signature for e-filing my tax return.

Taxpayer: ______ **Date:** ______ **Spouse:** ______ **Date:** ______

OFFICE USE ONLY *PBC documentation EF WP/DOCs (DISC/PYMT) Date In / Via ______

ID % of AGI _____ Plans for next year: Recommendations: Missing items / Questionable items (?)

Compare prior ITR: