

MAKING TAX PREPARATION EASIER

(AND LE\$\$ EXPENSIVE)

- ◆ Provide original documents rather than copies or faxes. We return the originals to you. Do not tear W-2's apart (we scan them to have a copy on file). Please provide ALL pages of brokerage 1099 year end reports.
- ◆ Have your data as complete as possible. There are often things you can not control having to wait for but when you can have it all together it helps the cause.
- ◆ Write legibly and when not needed, do not crowd the paper with dollar signs, and pennies. Unless there are foreign currencies in your data, we know we are working with dollars. We use round dollars when preparing tax returns so providing info with pennies forces us to do the rounding and often times results in confusing numbers – is that \$600 or \$6.00? It is also helpful to be consistent with commas separating thousands. An entry of 1,234 is one thousand two hundred and thirty four and in most cases it is dollars. 1234.00 is probably intended to mean the same, as is 1234 but when some numbers have decimals and pennies and others don't it is difficult. Please keep in mind that our objective is to accurately read your input.
- ◆ Don't confuse things by duplicating entries. If health insurance is entered on the business schedule, don't duplicate it by entering it on the medical schedule. Just indicate on the medical schedule "entered on business schedule".
- ◆ Don't provide stacks of receipts for things like pharmaceuticals or checks to church. Keep those in your records in case you are ever audited or need them for other purposes. We simply want to know what you spent out of pocket on prescription medications and what you amounts you gave to various charities. It gets confusing when a person gives us a stack of receipt letters from various charities, enters various amounts on a tally sheet, and then enters a total on the organizer and none of the three totals agree.
- ◆ Early early early (of course). Don't wait till the last minute as an exhausted cranky CPA is not what you want.
- ◆ Our mission is to accurately gather your data so we can prepare your tax return for a reasonable fee. We would rather spent our time helping you to minimize your taxes or maximize your financial situation than spending our time asking for clarification on data or requesting missing information