

Tax Preparation Things to Bring List

All of the following are **REQUIRED** for us to prepare your taxes.

- Completed** EZ4U Tax Organizer and worksheets
- 1099SA & 5498SA forms, if you have an HSA
- ALL 1099s, W2s and K1 forms. **No exceptions.** The IRS has them. We are required to report them.
- Any FINAL closing statements received during the year and original purchase FINAL closing statements if you sold property during the past year. (Your title co. keeps copies)
- Unemployment and Social Security Statements (the pink and white one is mandatory) received during the year.
- Any IRS correspondence received during the year.
- VOID check, (*only if we don't have a current one for you*)
- Extension, (*only if you filed your own*)
- Statements on any Foreign Accounts that were valued at over \$10,000 during the past year.
- A **copy** of your vehicle registration (*only if you itemize*)
- All year-end lender loan statements (1098s) (*only if you have a business or you itemize. Also include any final closing statements on refinance*)
- All Self-Employment **Excise Tax returns** for the past year.
- Receipts for real estate tax paid during the past year with note as to personal, business, rental and/or farm, etc. (*only required if you itemize or are self-employed*)
- Personal property tax receipts for the past year. (*biz only*)
- NEW CLIENTS ONLY:** 2022 tax returns.

To see if we can save you money elsewhere...

- Year-End Investment Reports (investments not with us)

We do not charge to check on these things for you!

Check out the Money-Saving Dates on the back!
(to the right if you're viewing on the web)

Money-Saving Dates

How to take advantage of our discounts & avoid additional fees.

MARCH 4, 2024 - MONDAY - 1040 ONLY. (6 weeks deadline)

To get a 20% Early Bird Discount, we must have EVERYTHING we need to complete your return by 5 p.m on this date. *This discount does not apply to New Clients.*

MARCH 18, 2024 - MONDAY *1065/1120S - **FRIDAY, FEBRUARY 23**

We must have EVERYTHING we need to complete your return by 5 p.m on this date or you will receive a \$50 RUSH fee. (4 weeks to deadline)

APRIL 1, 2024 - MONDAY *1065/1120S - **FRIDAY, MARCH 1**

We must have EVERYTHING we need to complete your return by 5 p.m on this date or you will receive a \$80 PANIC fee. (2 weeks to deadline)
At this time and thereafter, we give NO GUARANTEE that your return will be completed by the filing deadline, but we'll sure try.

APRIL 8, 2024 - MONDAY * 1065/1120S - **FRIDAY, MARCH 8**

We must have EVERYTHING we need to complete your return by 5 p.m on this date or you will receive a \$150 CRUSH fee. (1 week to deadline)

APRIL 15, 2024 - MONDAY *1065/1120S - **FRIDAY, MARCH 15**

DEADLINE. If your taxes have not been completed, you will need to file an extension. Our office charges \$100 for completing and filing a 6-month extension. You must pay any 2024 estimated tax due by April 18 to avoid any *late-payment penalty & interest.*
*1065/1120S extend to **WEDNESDAY, SEPTEMBER 15.**

SEPTEMBER 17, 2024- TUESDAY *1065/1120S - **MONDAY, AUGUST 19**

EXTENSIONS - We must have EVERYTHING we need to complete your return by 5 p.m on this date or you will receive a \$50 RUSH fee. (4 weeks to deadline) 1040 extended returns are due on **TUESDAY, OCTOBER 15.**

OCTOBER 1, 2024 - TUESDAY *1065/1120S - **MONDAY, SEPT 2**

EXTENSIONS - We must have EVERYTHING we need to complete your return by 5 p.m on this date or you will receive a \$80 PANIC fee. (2 weeks to deadline)

OCTOBER 8, 2024 - TUESDAY *1065/1120S - **MONDAY, SEPT 9**

We must have EVERYTHING we need to complete your return by 5 p.m on this date or you will receive a \$150 CRUSH fee. (1 week to deadline)

OCTOBER 15, 2024 - TUESDAY *1065/1120S - **MONDAY, SEPT 16**

DEADLINE. There are no more extensions for 2024. File by this date to avoid any late filing penalties.

*1065 PARTNERSHIP & 1120S CORPORATE RETURNS: (*C Corps, form 1120 are now due the same day as individuals.*)