

Things to Keep in Mind

Please read each bulletin and remember that not all bulletins apply to all clients.

Tax Documents

- Please do not send in your tax documents **until** you have received all the documents needed. Your tax return will not be worked on until all documents have been received.

Banking Information

- Make sure to update the office if your bank information has changed; a copy of a voided check is required. Our staff cannot take bank account information over the phone.

Driver's License or State ID

- If you have renewed or changed the information on your Driver's License or State ID, send in a copy of the front and back of the updated ID for all taxpayers.

Documentation

- For those taxpayers who typically qualify for the child tax credit and/or Head of household, the IRS require that you provide us (the tax preparer) a copy of your dependent's birth certificate and Social Security card.
- For those taxpayers who typically qualify for any education credits, they must provide form 1098-T. Most colleges do not mail out these forms, your student dependent must log in to their student account and print out tax document 1098-T.

Virtual Currency

- Our office needs to know, if at any time during 2022, did you receive (as a reward, award, or payment for property or services); or sell, send, exchange, gift, or otherwise dispose of a digital asset (or a financial asset in a digital asset). There are hundreds of virtual currencies. Just to mention a few of the most popular ones, Bitcoin, Litecoin, Ethereum, etc.

Non-compliance with the above bulletins may delay the filing of your tax return.