

TAXES PLUS

P.O. Box 1199
Rockport, ME 04856
Phone: 207-230-8624 Fax: 617-963-7147

New Client Checklist

Income tax time is here! The enclosed packet has been prepared to assist you in gathering information for your 2021 tax return. Review the entire packet and answer all yes/no questions.

This year the deadline is March 10th to have all materials in for us to guarantee a return finished prior to the April 18th deadline. We understand that some items come later in March, but we would expect all materials and clarity about what is being waited for and when the expected arrival time is. Although we establish the March 10th deadline few returns go on extension. We set this expectation in order to be sure that we provide timely and accurate service for all of our clients.

Before beginning tax returns this year, we will be requiring the following:

-- signed and initialed engagement. (attached)

-- organizer reviewed and completed. By completed we mean that you have answered the questions and provided either on the organizer or in your own similar format listings of your income and expenses. You do NOT need (but are welcome to) put in the information from the forms that get submitted to the IRS - 1099s, W-2s, K-1s etc. However, we DO require that you inform us either on the organizer or in another way exactly how many of each you have so that we can ensure that we are not missing any.

-- due diligence forms if required. Examples include - dependent credits, head of household filing status, basis for K-1's, proof of self-employed income, American Opportunity Ed Credit. You can find due diligence questionnaires on our website www.joycemohrea.com under **Resources**.

-- current ID. If your ID (driver's license or State ID), and/or spouse's if applicable, has expired by the time you submit your organizer and tax documents, please be sure to include a copy of your updated ID(s). Please also include copies of your social security card, and your spouses and child(ren) if appropriate.

-- transcripts. We need to have your IRS tax transcripts for 2021 before we can start your return, so that we know what the IRS says they sent to you for Stimulus number 3, Advanced Child Tax Credit, as well as what estimated tax payments were posted to your IRS account. If you chose to engage with Taxes Plus, you will need to procure your own tax transcript or we will have you complete Form 8821 and collect that information ourselves, at no additional charge.

You can get your own transcripts from the IRS and provide them to us by going to: <https://www.irs.gov/individuals/get-transcript>

Please provide us this packet and all supporting documents, including W-2 and 1099 statements. Anything that is provided by upload or other methods needs to be clear enough to read, multiple pages documents need to include all pages, and documents are preferred in PDF format, as JPEGs can be challenging to read. When naming uploaded documents, please avoid non numeric alpha character, as they will make it so that we cannot open the document. Ex: 2021_Client last name_W-2_job name_date posted

Sincerely,
Joyce Mohr, EA and the Taxes Plus Team