

# The Associates, LLC

## *Tax & Accounting Professionals*

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January 2023

Dear Client,

Thank you for your interest in our firm. The Associates look forward to continuing a strong ongoing professional relationship with you.

April 15<sup>th</sup> will be here before you know it. If you haven't already scheduled a zoom appointment, please call as soon as possible so that we may accommodate you.

Please make sure to upload all your documents to your portal, or if you prefer, mail it to our NJ office. After we review your information, we will contact you to discuss.

**Please note that we require payment in full before returns are released.**

The following is a list of information necessary to prepare a complete and accurate tax return:

1. **Copy of last year's Federal and State tax returns (*new clients only*)**
2. Federal and state estimated taxes paid (date and amount of each payment)
3. W2s
4. 1099 MISC
5. 1099 INT
6. 1099 DIV
7. 1099 B - please have the cost basis and purchase date for all sales
8. 1099 G - last year's state refunds
9. 1099 R - distribution from retirement/pension
10. K-1s (Partnership, S-Corp, Estate & Trust)
11. Rental property information
12. 1099 G - Unemployment information
13. 1098 Mortgage interest paid and real estate taxes paid
14. Medical expenses/Health Insurance Premiums- not reimbursed
15. Form 1095-A Obamacare Insurance Statement, 1095-B, 1095-C
16. Charitable contributions
17. IRA contribution amount (Traditional, ROTH, SEP, SIMPLE)
18. Dependent information - social security # and DOB
19. Child care information (amount paid, address & tax ID # of care giver)
20. Business expense worksheet (download at [www.theassociatetax.com](http://www.theassociatetax.com))
21. Direct deposit worksheet (if interested in having refunds directly deposited)
22. Child Care Form 6419 (if you received advanced child tax credit)

If you know you will be unable to meet the April 15<sup>th</sup> filing deadline, please let us know so that we may file an extension for you. If you don't ask for an extension, we do not file one for you.

If you have any questions, comments or concerns please contact our office.

Very truly yours,

*The Associates LLC*