How to Organize Your Tax Information

You can help minimize your tax preparation fee and our turnaround time by submitting your information as complete and organized as possible. Our bills are based on the tax form charges and the amount of time spent processing your returns, including meetings and telephone time.

If you are using a Tax Organizer, follow it like a checklist. If you do not have an Organizer, we can provide one to you. This will help you to organize your income tax information. Please indicate any accounts that may have been closed and make any notes you feel will be helpful. For all returns we need the following:

_____ The completed tax questionnaires. While we have documented your prior year issues, this helps us capture any new information that may affect your returns!

_____ Your signed engagement letter. If a joint return is being filed, please make sure BOTH SPOUSES have signed it prior to submitting your documents.

_____ Proof of Health Insurance Coverage. Copies of Insurance cards and any applicable 1095 forms for all household members identified on your SIGNED Health Care coverage questionnaire.

_____ Copies of Driver's Licenses for Taxpayer, and if a joint return, for spouse.

Enclose copies of the following documents, if applicable.

_____ Copies of mileage logs if you are deducting vehicle usage

_____ Copies of death certificate for spouse

_____ Copies of any bankruptcy or debt forgiveness documents

_____ Receipts for all charitable contributions you want to deduct

_____ Copies of estimated tax payments you made

_____ HUD1 statement from purchase, sale or refinance of property

Please include any other documents you feel may influence the accuracy or completeness of your tax returns.

Should you have any questions, feel free to contact our office.

Hours beginning late January 2019, M-W-F, 8:00 to 5:00, T-TH 8:00 – 8:00, SAT 8:00 to 12
Phone: 301-473-4445   Email: frontdesk@jgeorgecpa.com