

Dave Jones Accounting Services

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January 5, 2020

Dear Tax Client:

We are excited to assist in your tax preparation. The 2020 tax year includes many changes. Our annual tax reminder checklist is below.

Tax items needed:

Wages (W-2) Interest Income (1099-Int) Dividend Income (1099-Div)
 State Refunds (1099-G) Misc Income (1099-Misc) IRA Contributions
 Unemployment Comp Social Security (1099-SSA) College Expenses (1098-T)
 Stock Sales (1099-B) Retirement Income (1099-R) Partnership/S-Corp Income (K-1)
 Health Insurance Forms (1095-A) (You must provide this document if you had Obamacare/Marketplace)
 Settlement Statements from refinance/purchase of Home

Tax Information needed:

Please indicate if there was a change in Marital Status: _____
Children/Dependents (write in any additions during 2020):
Full Name: _____ Social Sec #: _____ Date of Birth: _____
Medical Expenses (Premiums, Prescriptions, Doctors, Dentists, Eye care, etc.): _____
(Please note that expenses must exceed 7.5% of income in order to be deductible) Medical Miles: _____
State Taxes Paid: _____ Sales Tax on Large Purchases (Car, RV, etc.): _____
Real Estate Taxes: _____ Mortgage Interest: _____ PMI: _____
Charitable Contributions: _____ Charitable Miles: _____ Noncash Donations: _____
Job Expenses (Unreimbursed expenses): No longer deductible.
Business Income/Expenses (attach separate sheets)

Direct Deposit is available for your refunds. (The same as last year: YES/NO (if the same I will not need this info)
Bank/Credit Union _____ Routing Number _____ Acct # _____
Checking or Savings _____

Please note that LLC's and SCorps have to be filed by March 15. Personal Tax Returns are due April 15. An extension may be filed for businesses or personal tax returns which gives you an additional 6 months to file your return (however payments need to be made by April 15 or a penalty will apply).

All of the above information may not apply to you. Please use the online scheduler to book a sit-down appointment.

Hours: I am available January 15th to April 15th from 9:00am-7:00pm Monday thru Saturday (not Sunday; please do not call or come by on Sunday). You can schedule your tax appointment online using the link in the email.

Appointments:

Unfortunately, due to Covid-19 we will not be having any appointments in-person. All appointments will be held by phone or video call. You may upload your electronic tax documents to an Online Secure Folder created for you. Email or call us if you do not already have one and we can create one for you. We do have a secure box at the front door where you can drop off your tax documents.

Thank you,

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