

# The Tax Shoppe

## **Income Tax Preparation**

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Welcome to tax season 2022!

Steps our clients can take to help us process your information as quickly as possible:

- Open all your mail and unfold the pages – We have had clients send us dividend checks
- Do NOT send receipts. Please total and group the receipts for everything and just give us the totals
- Do NOT staple your papers together—we scan everything, and all staples have to be removed in order to do that. Use paper clips only if you want to group items
- When mailing your information, do not send in multiple envelopes (this will also save the environment and your wallet!)
- Do NOT send us our letter; we have no need for it since we wrote it
- Send ALL your information in AT ONE TIME. Sending things piecemeal will only slow down the process of getting your return completed. Requesting missing information and waiting for it to arrive is one of the biggest time suckers. There is also the risk of your return being completed without the additional information
- If we do request anything missing from your package, it behooves you to send it in immediately
- Only send your information to us once. There is no need to mail it, email it and then fax it. It is a huge waste of paper and it is a huge waste of our time to go through each page to make sure there isn't an additional document in one of the sets
- Indicate how you want to file (Single, Head of Household, Married filing jointly, Married filing separately) if it is not obvious there is a change or if you are new; there are several options
- Always send a COMPLETED Checklist and a SIGNED Form 8879 (If married, both of you would need to sign one form) with your paperwork. These are CRITICAL pieces of information that we need each and every year! We need this for EACH member of your family who is filing a return.
- Be sure your name is on every piece of paper you give us. We want to return it to the proper file if it accidentally falls out.
- Remove unnecessary pieces of paper from the documents you send (example: a page marked “This Page is Intentionally Left Blank”). We don't need them, and we have to sort them out, slowing down the process. If document has information on both sides, we need both sides.
- Tear off the perforated sides to the documents that have them
- Separate documents (W-2, 1099, Int, Div, etc) for dependents (who would also need a checklist and 8879)
- Make sure your voicemail box is set up and ready to receive voicemail...this includes emptying your mailbox periodically
- Listen to your voicemail. We leave detailed information in order for us to be able to efficiently complete your turn
- Giving us flash drives causes many delays. Please print out what we will need to prepare your returns instead of giving us the drive
- You do not need to label the forms from your employer, bank, etc. We do know what a W-2 is. The only exception would be if you have various forms for items like rental property, vacation home, etc, that will need to be distinguished from the other papers or a percentage that only you are claiming
- Allow 3-4 weeks for the processing of your return
- If it is marked on your checklist that you will be picking up your copies of the tax return, pick it up in a reasonable timeframe. We do not have unlimited storage capabilities