



PO Box 1165, Bedford, IN 47421 *(618)889-6935

January 1, 2022

Now that 2021 has come and gone, it is time to start thinking about your taxes. You may have received some documents, and you should have most of them by the first week of February.

I am preparing taxes again this year in the same location as the last 4 years. My office is in Sycamore Square with Jay Wilson CPA. The address is 2047 16th street, Bedford IN 47421. Look for the purple and green sign!

Since the Covid 19 pandemic, we are changing our business model for contactless document exchange for those who prefer this method. Jay installed a drop box for your convenience, and I have a portal to upload documents (call me for a Link -it changed from previous years). I am taking appointments if requested and Amanda will still take your documents at the window. **You choose your preferred method.**

Please look at this list to make sure you provide all pertinent documents when you're ready for me to start on your tax return. If additional documents are requested, please provide them promptly so I can prepare your return in a timely manner.

- W-2 forms
- 1099 forms (Misc., NEC, retirement, stockbrokers, etc.)
- Closing statement for new home if purchased in 2021.
- Closing statement if you sold a home in 2021.
- 1098 mortgage statement
- 2021 paid property tax or rent paid in 2021.
- Medical expenses including dental, eye doctor, prescriptions, and doctor visits (total only please) Not required...only if you itemize deductions.
- Schedule C expenses if self-employed income (totals only* you keep the receipts)
- Student loan interest paid. (Usually not mailed, you retrieve it from the student file)
- Educational expenses; a 1098T is required for tuition deduction
- Donations to church or qualified Charities. \$600 is allowed without itemizing this year
- Bank information for Direct Deposit- voided check preferred (routing and account number if checks are not available)
- Any other items that pertain to your Tax Return- if you have questions, please contact me.
- Social security card if you had a new baby in 2021.
- Did you receive, sell, exchange, or otherwise acquire any financial interest in any virtual currency? Please inform me if you have this and I do not ask you.
- 529 plan documents

IMPORTANT

1. Please provide the dollar amount you received for the Economic Impact Payment #3. If your amount does not match the IRS, there could be a delay in your refund.
2. Please provide the amount of Advance Child Tax Credit. Accuracy is key to a timely refund.

I will see you soon!

Sincerely,
Carla Brock