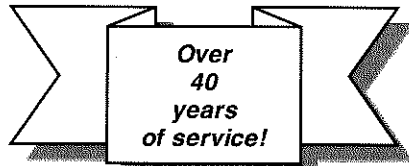


**HOW CAN I PAY LESS  
IN TAXES???**  
**USE A FIRM WITH  
EXPERIENCE!**



Our Job: "To make sure every client pays the least amount of Federal and State income taxes legitimately."

**Auerr, Zajac &  
Associates, LLP**  
Certified Public Accountants



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**Our Staff:**

**Allen A. Auerr, Jr., CPA, MBA**

Over 40 years experience  
Individual and Corporate Tax Professional  
Tax Planning Expertise

**Kevin A. Auerr, CPA**

Over 15 years experience  
Individual and Corporate Tax Professional

**Richard S. Hastry, EA**

22 years representing clients  
Former IRS Revenue Officer  
Collection Mgr. 27 years

**Katrina Kowalski, CPA, MSAIS**

Over 10 years experience  
Individual and Corporate Tax Professional

**Gordon McClay, EA, ATP**

Over 40 years experience  
Individual Tax Professional

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Over 30 years experience  
Individual and Corporate Tax Professional

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Over 10 years experience  
Individual Tax Professional

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Over 20 years experience  
Payroll Taxes  
QuickBooks Specialist

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Individual and Corporate Tax Professional

**John M. Welch, CPA, MSA**

Over 3 years experience  
Individual and Corporate Tax Professional

**John F. Zajac, CPA**

Over 40 years experience  
Individual and Corporate Tax Professional



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**Tax Help Guide**

Here is a simple and easy guide to assist you in preparing your tax documentation.

Please note below if you have an appointment. Also identify your tax preparer by placing a checkmark in the appropriate box below.

**Appointment Information**

Date: \_\_\_\_\_ Time: \_\_\_\_\_

**Tax Preparer:**

- Allen A. Auerr, Jr., CPA, MBA
- Kevin A. Auerr, CPA
- Katrina Kowalski, CPA, MSAIS
- Gordon McClay, EA, ATP
- Carl V. Pergola, CPA, MST
- Susan M. Reavy, CPA, MPA
- Leslie Scherer, CPA
- John M. Welch, CPA, MSA
- John F. Zajac, CPA

# TAX INFORMATION CHECKLIST

## Personal Information

- Taxpayer and/or spouse's name, address, phone numbers and SS#
- Filing status (if joint need each filers' names, dates of birth, occupations and social security numbers)
- Dependents
  1. Name
  2. Social Security Number
  3. Date(s) of Birth
- Health Insurance Verification
- E-mail: \_\_\_\_\_

## Income

- W-2's with correct name, address and Social Security Number
- Interest & Dividends – Need 1099's
- Alimony – Paid or received – Need a copy of decree, recipients' name and SS#
- Capital Gains – Need 1099 and Original Cost Data
- Pensions – Need 1099-R statements
- Rent – Income and expenses
- Unemployment – Need 1099's
- Social Security Info. – Need 1099-SSA
- Business (preparer will discuss)

## Adjustments to Income

- IRA Contributions – Need Year End Statements of IRA Balances
- SEP/Keough Retirement
- Student Loan Interest
- Rent paid – Need total paid for the year
- Bank Information - Account Interest, cashed in savings bonds, etc.
- Self Employed Health Insurance: Need total paid for the year
- Penalty for early withdrawal from savings
- Child Care Expenses – Need Name, address, and S.S. # or Tax ID # of provider and amount paid for the year

## Itemized Deductions – (Preparer will discuss additional deductions not listed)

1. Medical Expenses
  - Prescriptions, insulin, doctors, hospitals, nurses, dental care, insurance premiums, transportation, etc.  
Total Amount \$ \_\_\_\_\_
  - Transportation: Total number of miles \_\_\_\_\_
2. Taxes
  - Prior year's State Refund (1099G)
  - Real Estate Taxes
  - Excise Tax

## 3. Interest

- Mortgage and Home Equity – bring statements
- Refinance and Points – bring statements
- Investment (preparer will discuss)

## 4. Charitable

- Cash, checks and non cash (list of items and receipts)

## 5. Casualty or Theft Loss (preparer will discuss)

## 6. Moving Expenses (preparer will discuss)

## Credits

- Education Credits – Need tuition paid for each dependent and money paid out of 529 Plan (1099-Q)
- Title V Septic Credit for Massachusetts
- Energy related expenditures
- Circuit Breaker Credit (Senior Citizens) - Need tax bill

