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

Over 40 years of service!

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

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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 20 years experience
Individual and Corporate Tax Professional

Gordon McClay, EA, ATP
Over 50 years experience
Individual Tax Professional

Susan M. Reavy, CPA, MPA
Over 10 years experience
Individual and Corporate Tax Professional

Terri King, Staff Accountant
Over 20 years experience
Payroll Taxes
QuickBooks Specialist

Leslie Scherer, CPA
Over 30 years experience
Individual and Corporate Tax Professional

Ethan J. Steeves, CPA
Over 5 years experience
Individual and Corporate Tax Professional

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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
- ☐ Gordon McClay, EA, ATP
- ☐ Susan M. Reavy, CPA, MPA
- ☐ Leslie Scherer, CPA
- ☐ Ethan J. Steeves, 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
  4. Copy of Birth Certificate or Social Security card if not already submitted
- ☐ 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

A & Z Associates, LLP CPAs