 

**4930 Cascade Rd SE B-6** Visa, Mastercard

**Grand Rapids, MI 49546** American Express

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**Phone: (616) 970-8286 Venmo ID @Atucker\_tts**

**Credit Card / Debit Card Fee - $5.00**

**Standard Return – Starts @ $125.00 (1040, Sch A/B, Dependent Care / MI1040 / City)**

**Easy Return – Starts @ $60 (W2’s, No Dependents)**

**Earned Income Credit / Education Credit / Additional State and all other**

**work / forms will be charged accordingly**

**Quick Collect (Tax Preparation Fees come out of your return) – $30**

**Tucker’s Tax Service meets or exceeds all IRS Data Security Requirements. Data Security Policy is available upon request.**

**All Federal & State returns are filed electronically. The IRS Requires taxpayer(s) to review their return, then sign the Form 8879. In most cases this will now be completed electronically. Therefore separate contact information is needed.**

**VERY IMPORTANT: Please provide current email address(es) and phone number(s), current banking information.**

* **Taxpayer Email Phone #**

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* **Spouse’s Email Phone #**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* **Current Direct Deposit Information.**

**Deposit Slip (preferred) Or**

**Banking Institution** **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Routing Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Account Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

NOTE: If I already have the current account numbers on record, Please include the last 4 digits of the account number. Note: **If I already have the information on record OR if you want it deposited into a different account, a Deposit Slip is always preferred.**

**Additional Documentation Required (Copies / Pictures)**

* **Drivers Licenses (Taxpayer and / or Spouse). I may already have your drivers license on file, but if unsure, please include a copy. Also, I will require a copy of your Drivers License if it:**
  + **Expired in 2024**
  + **Or in 2025, before you have your taxes prepared**
* **W2’s (Wage Statement from Employer(s))**
* **1099’s (Retirement, INTerest, DIVidends, B sale of stock, MISC other income)**
* **Unemployment Statement**
* **Social Security Statement**
* **1099-SA Health Savings Account Statements**
* **K1’s (Trust, Partnerships)**
* **1099-T Tuition Statement - Also include cost of books, supplies, etc. These costs can be totaled but will require documentation in the event of an Audit.**
* **1095-A ObamaCare (Insurance purchased through the Marketplace)**
* **1099-E Student Loan Interest**
* **IRA, MESP Contributions (Not 401K contributions thru your employer)**
* **Earned Income Credit I must prepare a “Due Diligence Worksheet” regarding the Earned Income Tax Credit and Education Credit. If I suspect you could have an issue when claiming either Credit, I may require additional documentation to prevent issues when filing. NOTE: I can refuse to prepare a tax return including the Earned Income Tax Credit or Education Credit if I suspect the taxpayer(s) and / or dependents do not meet the requirements for the Earned Income Tax Credit or Education Credits. Thanks for your understanding.**

**Other Information (I don’t need this documentation. But documentation is required in the event of an audit. Keep good records!)**

* **Alimony (Pre 2019 Judgement) Paid** **\_\_\_\_\_\_\_\_\_\_\_\_ Received \_\_\_\_\_\_\_\_\_\_\_\_**

**If paid, to Whom \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ SS# \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* **Educator Expenses \_\_\_\_\_\_\_\_\_\_\_\_**
* **Health Savings Account Contributions \_\_\_\_\_\_\_\_\_\_\_\_**

**DO NOT include amounts paid through you’re your Paycheck/Employer**

* **Dependent Care Expenses \_\_\_\_\_\_\_\_\_\_**

**Please include Statement with Dependent Care Provider’s Name, Address, Federal ID, and amount paid.**

**ITEMIZED DEDUCTIONS**

* **Total out-of-pocket medical (do not include Employer paid/employer withheld premiums, they are excluded from taxable income) or Social Security Medicare A,B,C,D \_\_\_\_\_\_\_\_\_\_\_\_.**
* **Home Mortgage Interest \_\_\_\_\_\_\_\_\_\_ If you Purchased / Refied / Sold, please bring closing statements. Home Equity Loans not used for “improvements, no longer deductable.**
* **Property taxes (all properties) \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_.**
* **Sales Tax (automobiles, boats, homes, etc) \_\_\_\_\_\_\_\_\_\_.**
* **Automobile License Plates – 1984 and newer (NOT motorcycles/trailers/or boats) \_\_\_\_\_\_\_\_\_\_\_.**
* **Contributions – Church / Goodwill etc. \*\*Some cash contributions are allowable \_\_\_\_\_\_\_\_\_\_\_\_.**
* **Gambling Losses (up to the amount won) \_\_\_\_\_\_\_\_\_\_.**

**Review List**

* Current email address(es) and phone number(s)
* Drivers License(s)
* Current Direct Deposit Information
* W2(s)
* W2-G(s) Gambling Statements
* 1099(s) Self Employment
* 1099(s) Interest / Dividends Earned
* 1099(s) Retirement or withdrawal from Retirement Account
* Unemployment Statement
* Social Security Statement
* 1099-SA - Health Savings Statement
* K1(s)
* 1099-T College Tuition Statement(s)
* 1095-A Market Place Health Insurance Statement
* 1099-E Student Loan Interest
* IRA Contributions
* Alimony Paid or Received
* Educator Expenses
* Dependent Care Statement(s)
* Principal Residence - Mortgage Statement / Property Taxes
* Other Properties - Mortgage Statement / Property Taxes
* License Plates (1984 or newer automobile. No motorcycles / boats)
* Contributions
* Gambling losses (up to the amount of Gambling winnings reported)