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Hello Friends!

It's that time of year again. I just wanted to give everyone a friendly reminder of items you can get together:

Please inform us of any changes such as:

- Change of Address
- Getting Married—We will need SS# and DOB
- Getting Divorced
- Having or adopting a child - We will need SS# and DOB
- Unemployment

Forms you (may) need:

- W-2
- W-2G Gambling Income
- 1099 Retirement
- 1099 Income
- Interest Income
- Dividend Income
- Government Payments
- Railroad Retirement
- Tuition Statement
- Social Security
- K-1
- 1095 A, B OR C

List for Itemization on Schedule A:

- Health Insurance Premium (No Pre-Tax)
- Real Estate Tax
- Personal Property Tax
- Home Mortgage Interest
- Charity (Donation)
- Unreimbursed Employee Expenses

List for Itemization on Small Business / Schedule C:

- Total Income
- Advertising
- Business Insurance
- Office Expense
- Rent
- Meals & Entertainment
- Utilities
- Health Insurance
- Uniforms
- Charity (Donation)



I look forward to assisting you through the entire tax process and keep you informed on upcoming tax issues.

*** "SECURE DROP BOX" is located next to the main door.***

Sincerely,
Penny