Trudy C. Durant and Associates ***LLC*** ACCOUNTING AND TAX SERVICES

January, 2020

Dear Client:

Tax season is upon us once again and it is time to prepare for your annual visit! Please complete the enclosed Deduction Worksheet and bring it with you to your interview.

In addition, we will need the following personal and investment information:

1. W-2s and 1099s (copies acceptable)
2. Interest and dividend income statements (including foreign bank accounts)
3. Unemployment information
4. Sale of stocks / mutual funds (including purchase price & date of purchase)
5. Pension or IRA distributions
6. Medical expenses not reimbursed by insurance
7. Medical insurance premiums paid directly
8. Form 1095-A Obamacare Insurance Statement
9. Mortgage and Co-op information
10. Contributions
11. Estimated tax payments made (including dates and amounts)
12. Social Security numbers and dates of birth of all dependents

For those of you who are new to us this year, please bring a copy of last year's tax return.

Just a reminder… please schedule your appointment as soon as possible to guarantee the time and date of your choice. Please remember that your appointment time is reserved especially for you. The courtesy of 24 hours notice is requested if you need to change your appointment.

******If it is necessary for you to **mail** your information to us, office policy requires a **$350 deposit.****

If for some reason you are unable to file by April 15th, please notify our office as soon as possible so we can file a timely extension for you.

As always, if you have any questions or comments, please feel free to call.

Best regards,

Trudy, Linda, Anne and Claudia

"Often imitated—Never duplicated"

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