Trudy C. Durant and Associates LLC ACCOUNTING AND TAX SERVICES

January 2022

Dear Client:

We are looking forward to getting back to a normal tax season. It is time to prepare for your annual appointment! We will have face-to-face, Zoom and telephone appointments available.

We will need the following personal and investment information:

1. Deduction Worksheet
2. W-2s and 1099s (copies acceptable)
3. Interest and dividend income statements (including foreign bank accounts)
4. Unemployment Form 1099G (available at the state website)
5. Sale of stocks / mutual funds (including purchase price & date of purchase)
6. Pension or IRA distributions
7. Medical expenses not reimbursed by insurance
8. Medical insurance premiums paid directly
9. Form 1095-A Obamacare Insurance Statement
10. Mortgage and Co-op information
11. Charitable Contributions
12. Estimated tax payments made (including dates and amounts)
13. Social Security numbers and dates of birth of any new dependents or spouse
14. **New form "Letter 6419"** for the Advanced Child Tax Credit

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

Just a reminder… 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, so let us know as soon as possible if you cannot keep your appointment.

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

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

Best regards,

Trudy, Linda, Anne and Claudia

P.S. Make sure to check out Tax Tune #40 on our website

"Often imitated—Never duplicated"

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