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

January, 2025

Dear Client:

It is time to prepare for your annual appointment! We are excited to see everyone in our New York and New Jersey offices. If you are not local, you will have the option of Zoom, telephone or mail.

We will need the following tax documents:

1. Deduction Worksheet
2. W-2s and 1099s (legible copies acceptable)
3. Interest and dividend income statements (including foreign bank accounts)
4. Unemployment Form 1099G (available at the state website)
5. Brokerage tax statements
6. Pension and/or IRA distributions (Form 1099R)
7. Medical expenses not reimbursed by insurance
8. Medical insurance premiums paid directly
9. Form **1095-A** Marketplace Insurance Statement
10. Mortgage and Co-op information (Form 1098) including management letter
11. Charitable Contributions – cash and non-cash
12. Estimated tax payments made (including dates and amounts)
13. Social Security numbers and dates of birth of any **NEW** dependents or spouse

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, Claudia and Elaine

P.S. Make sure to check out Tax Tune #43 on our website

"Often imitated—Never duplicated"

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