

TIPS TO EXPEDITE PREPARATION OF YOUR 2021 TAX RETURN:

- 1. DO NOT** SEND PHOTOGRAPHS OF DOCUMENTS WITHIN YOUR EMAIL. THEY ARE NOT COMPATIBLE WITH OUR SOFTWARE AND DO NOT PRINT OR SCAN WELL. PDF'S ARE BEST. THERE ARE EXCELLENT APPS FOR YOUR PHONE THAT ARE FREE THAT WILL CONVERT YOUR PHOTOS TO PDF'S. GENIUS SCAN IS THE BEST FOR SCANNING AND SIGNING DOCUMENTS.
- 2. DO NOT** STAPLE YOUR DOCUMENTS. ALL DOCUMENTS ARE SCANNED, SO THEY WILL ALL BE REMOVED.
- 3. DO NOT** PUT POST IT NOTES ON YOUR DOCUMENTS. PLEASE LIST ALL QUESTIONS AND CONCERNS ON A SEPARATE SHEET OF PAPER.
- 4. DO NOT** SEND UNOPENED MAIL. **REMOVE YOUR DOCUMENTS FROM THE ENVELOPES.**
- TOTAL YOUR MEDICAL (INCLUDE DENTAL AND EYEGLASSES/CONTACTS), PREMIUMS AND PRESCRIPTION RECEIPTS AND PROVIDE THOSE TOTALS ON PAPER. **DO NOT** SEND ALL YOUR INDIVIDUAL RECEIPTS. MAINTAIN RECEIPTS FOR YOUR RECORDS.
- DONATION LETTERS FOR CONTRIBUTIONS GREATER THAN \$250 TO ANY ONE CHARITY ARE REQUIRED BY THE IRS TO CLAIM THE DEDUCTION. **DO NOT** SEND YOUR RECEIPTS FOR CHARITABLE DONATIONS BELOW \$250 EXCEPT FOR CAR DONATIONS. LIST YOUR DONATIONS ON A SHEET OF PAPER. FOR CAR DONATIONS, PLEASE INCLUDE THE LETTER YOU RECEIVED FROM THE ORGANIZATION.
- PLEASE **SIGN** THE ENGAGEMENT LETTER AND CONSENT AND RETURN LOCATED ON OUR WEBSITE WITH YOUR DOCUMENTS FOR DROP OFF/EMAIL AND PLEASE INCLUDE A VOIDED CHECK TO PLACE IN YOUR TAX FILE FOR REFUNDS AND/OR PAYMENT TO THE GOVERNMENT. **PLEASE PROVIDE AN EMAIL ADDRESS AND ADD US TO YOUR CONTACTS TO PREVENT OUR COMMUNICATIONS FROM GOING DIRECTLY TO SPAM.** HOTMAIL ACCOUNTS ARE NOT COMPATIBLE.
- RETURNS ARE PROCESSED IN THE ORDER RECEIVED. THE EARLIER, THE BETTER! **DROP OFF AND EMAIL IS PREFERRED.** SECURE PORTAL OPTION IS ALSO AVAILABLE THROUGH OUR WEBSITE WWW.CPAGALLO.COM. IF YOU HAVE QUESTIONS, EMAIL ANGELO@CPAGALLO.COM OR BARBARA@CPAGALLO.COM OR CALL **973-636-2800** TO ADDRESS ANY ISSUES BEFOREHAND.
- IF YOU WOULD LIKE TO RECEIVE A TAX ORGANIZER (YOUR PREVIOUS YEAR'S RETURN TO USE AS A GUIDE), PLEASE CALL 973-636-2800 OR EMAIL BARBARA@CPAGALLO.COM AND ONE WILL BE SENT TO YOU. DO NOT RETURN AN UNFILLED ORGANIZER TO THE OFFICE. IF YOU DECIDE NOT TO UTILIZE IT, JUST DISCARD IT. A SIMPLIFIED GENERIC VERSION IS AVAILABLE ON OUR WEBSITE IN THE DOCUMENTS TAB.
- PLEASE NOTE IF YOU RECEIVED EIP 3 UP TO \$1400 STIMULUS MONEY IN MARCH 2021. ALTHOUGH NOT TAXABLE, IT MUST BE RECONCILED ON YOUR FEDERAL RETURN.
- PLEASE REPORT THE NUMBER OF ADVANCE CHILD TAX CREDIT PAYMENTS YOU RECEIVED AND THE AMOUNT. IRS LETTER 6419 WILL BE MAILED IN JANUARY 2022 WITH THIS VITAL INFO.