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**Get Ready for Tax Time!**

Tax time can be hectic and stressful! We are committed to helping you during this time by guiding you through this annual process. We’ll start with a list of items frequently missed. Make sure you check it against your list.

√ Employer Reimbursement
√ Child Care Expenses
√ Special Accounts
√ Social Security Benefit
√ Sale of Propert
√ Student Loans
√ College Tuition

**GOT IT ALL!!**

Here’s a list of items frequently missed.  Check it against your list.

* Refinances.  We need to see the settlement statement.
* Child Care Expenses.  We need full name, address, and telephone and I.D. number of care providers.
* Estimated Tax Payments.  Find date and amount for payments.  Look near April 15, June 15, and Sept. 15 of 2010, and Jan. 15 of 2011.  A Jan. 2010 payment was used on your 2009 return.
* Sale of Property.  The most important thing is the settlement statement or HUD—1.
* Student Loans.  Form 1098-E reports interest.  We need this plus information about the type of loan.
* College Tuition.  Form 1098-T list college tuition paid.  This information can be found on the school’s website, under your personal account.
* Sale of Stock.  Form 1099-B shows sale price. We need data on the original purchase.
* Employer Reimbursement.  If your employer reimburses any of your expenses we need records to ensure we claim only the excess.
* Partnership Information. Schedule K-1 from partnerships and LLC’s always seem to arrive late.  Don’t worry.  Let’s do the rest of your return, and be ready to go when the K-1 arrive.
* Social Security Benefits.  Find the form 1099-SSA.  We need to declare the  gross amount you were paid, not your net monthly benefit.
* Special Accounts.  Do you contribute to an IRA, Roth IRA, or Health Savings Account?  These and others can cut your taxes.
* Complex Transactions.  Please call early if you have an unusual or difficult transaction.  Foreclosures, sales or exchanges of real estate, casualties, and such can take a lot of extra work.