

IMPORTANT

Before mailing back to me did you:

- Sign the engagement letter & Efile form(s)
- Complete Organizer
- Enclose all W2's, interest statements, stock brokerage statements & stock sales, mortgage statements, Unemployment 1099G's, and retirement statements (1099R)
- If a new client, did you enclose a copy of 2021 tax return
- Make sure you have used the correct address for mailing
- If necessary, enclosed a voided check
- MA residents, enclose health insurance form, others include the employer provided health insurance offer and coverage (form 1095 B or C, or marketplace 1095A)
- Enclose a copy (front & back) of Drivers License or State ID
- For airline personal, if needed, (states you can itemize) did you send layovers
- Put email address on organizer....and telephone number
- Include any form you are unsure of
- Missing items will delay the processing of your return