

# TAX TIME AGAIN!

## JUDGE FINANCIAL SERVICES

### TAX SEASON IS UPON US.

We enjoyed working with you last year and hope to see you again soon! Please review the following information for the upcoming tax season.

#### OUR WEBSITE:

Please visit [judgefinancial.com](http://judgefinancial.com) and check out our tax and accounting center.

#### 24/7 DROP OFFS:

**Email, fax, mail or drop off** your tax documents to us anytime.

#### ORGANIZERS:

Blank organizers can be found on the website or call our office for a **Free PERSONALIZED Organizer**.

#### REFERRAL BONUS:

We appreciate your referrals and offer a **\$25 credit** on your account for every referral that becomes a client.

#### IMPORTANT FOR

2021

- **UNEMPLOYMENT IS TAXABLE INCOME.**
- Please provide the exact amount of the **April 2021 Stimulus Payment Amount rec'd**, if applicable.
- Please provide the exact amounts of all **Advanced Child Tax Payments from July-Dec 2021**, if applicable.
- Please provide **IRS IP PINS**, if applicable.

#### DEADLINES:

**Tax Information must be submitted to us by April 1<sup>st</sup> in order to file a timely return.**

#### JFS POLICY:

**Payment is expected upon completion and before the tax return can be e-filed.**

#### COMMON TAX DOCUMENTS NEEDED:

- W2 Forms
- 1099 Forms,
- Unemployment Forms 1099-G
- 1098 Mortgage Interest Statements
- Real Estate Taxes Paid
- Healthcare 1095 A,B,C
- Tuition 1098-T
- SSA-1099 Forms
- 1099-B Broker Forms
- **Updated driver's licenses.**
- **Updated bank account routing and account number** for refunds.
- **Estimated Tax Payments** made 4/15, 6/15, 9/15 and 1/15.

**Actual receipts are not needed** for items such as medical, charity or business expenses, etc. We suggest that you **complete an organizer or prepare a summary** for us to use to expedite processing.