

TAX TIME AGAIN!

JUDGE FINANCIAL SERVICES

TAX SEASON IS UPON US.

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

OUR WEBSITE:

Please visit **judgefinancial.com** and check out our tax and accounting center.

24/7 DROP OFFS/NO

APPOINTMENTS:

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

2022

- **Unemployment is taxable income.**
Please provide your **Form 1099-G** that you must pull from the State's website.
- Please provide **IRS IP PINS for 2023**, if applicable.

DEADLINES:

Tax Information must be submitted to us by **April 1st** in order to file a timely return. Additional fees may apply to extended returns.

JFS POLICY:

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

NO EXCEPTIONS.

Please request payment to be made via the tax return if you cannot make payment upon completion.

Please **DO NOT STAPLE** your documents together, as we scan everything to your client folders.

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.