

JUDGE FINANCIAL SERVICES

TAX TIME AGAIN!

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.

ORGANIZERS:

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

2023 Tax

Questionnaire:

Please complete and send in with your tax documents. This form can be found on our website or call the office for one.

REFERRAL BONUS:

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

IMPORTANT FOR

2023

Please provide **2024 IRS IP PINS for 2023 Tax Returns**, if required.

DEADLINE:

Tax information must be submitted to us by **April 1st** in order for us to file a timely return. **A Late Surcharge of \$25** will be added to the fee for initial, first time, documents received after that deadline.

JFS POLICY:

PAYMENT is REQUIRED 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.

24/7 DROP OFFS/NO

APPOINTMENTS:

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

Please **DO NOT STAPLE** your documents together. We scan all papers to your client computer folders.

COMMON TAX DOCUMENTS NEEDED:

- W2 Forms/1099 Forms
- 1099-G Unemployment.
- **New 1099-K Form** for payments received from Third Party Payment Apps, online marketplaces or credit, debit or gift cards.
- 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.** (If renewed)
- **Updated bank account routing and account number** for refunds/payments.
- **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.