Tax Season 2022

Our team looks forward to serving you this tax season.

To better assist you with your tax preparation and filing needs, please take a minute to review the information provided in this document.

Section 1 – Filing Your Taxes

In this section, we have provided some helpful information on how to send your tax documents to our office, booking your appointment, filing an extension, and creating an IRS account to track your refund or return status.

Section 2 – Important Tax Questions

During your telephone or web meeting, your tax preparer is going to ask you several questions. We have provided a list of some of the questions we commonly ask our clients.

Section 3 – Important Tax Documents

When gathering and organizing your 2021 tax documents, please take a minute to review this list of the most common tax documents we will need to file your return.

Section 1 – Filing Your Taxes

It has never been easier to file your tax returns with TaxFirm.com. Our team provides you with peace of mind from the moment you book your appointment to the moment your taxes are filed.

For the 2022 tax season, our office is scheduling virtual appointments in lieu of traditional face-to-face meetings. We'll be here for you every step of the way, and we'll take you through the entire process safely via phone or video conferencing.

Step 1 – Sending your documents

Option 1: Upload PDF copies of your documents into your client portal.

E-mailing documents to us is not the safest way to send sensitive materials to our office. Our office utilizes **Citrix ShareFile** for our client portal**,** which allows for secure and encrypted uploads with an individual login and password.

Click here to access your client portal.

To ensure a complete and accurate tax filing, our office will need **PDF** versions of your 2021 tax documents. Please do not use JPEG, GIF, PNG, TIFF, or other file formats as they are often illegible.

If you cannot locate the original email that was sent with the initial password to set-up your client portal account, you can access your client portal by going to www.taxfirm.com, entering your email address and selecting “forgot password”.

Should you have any issues, please don't hesitate to reach out to us for assistance.

Option 2: Dropping your tax documents to our office (copies only)

Due to the potential for delays associated with mail and other overnight services, we will not be accepting any original documents for your protection.

We kindly request that you maintain your original 2021 documents and provide us with copies of all pages. If you are local, please feel free to use the **drop box** located outside of our lobby in Toms River. This option provides our clients with a socially distanced way to provide us with your tax documents.

Step 2 – Booking your appointment

To file your 2021 tax returns before the due date of **April 18, 2022**, we recommend securing an appointment with our office between February and March. After you have uploaded your tax documents, our office will contact you to schedule an appointment.

Step 3 – Meeting your tax preparer

Every year we look forward to meeting with our clients and understanding your tax needs. Our licensed tax preparers are here for you, and we will take the time to address your concerns, acquire a historical understanding of your past returns, and answer your questions.

Step 4 – Reviewing your draft return and filing

After your appointment, you will receive a link with a copy of your return and the required forms that will need to be signed.

To ensure an accurate and complete tax filing, please review your draft return. Once you have reviewed and have verified your tax return's accuracy, you can accept your return and electronically sign. Our firm uses **DocuSign** to obtain your electronic signature.

As soon as our office receives your electronic signature, we will file your tax return for you right away.

Need more time? Need a Tax Filing Extension?

No problem. For a nominal fee, our office can file a tax extension for you. If you need more time and would like to file a tax extension, simply call our office at 732.244.4500, or click the following link:

Click here to create a support request

Register to use the IRS Online Account Portal

Many mistakes can be avoided by obtaining important tax information from your personal IRS portal. For example, your IRS portal will display the amount of stimulus payments received, the amount of advanced child tax credit(s) received, and any estimated payments made, etc. You may also be able to obtain your wage and income information transcript that has been reported by employers, banks, etc.

Click here to create your IRS Account at www.irs.gov/account

Section 2 - Important Tax Questions

During your tax appointment, please be ready to answer some of the following questions:

Personal Information

- Did your marital status change during the year?
- Did your address change last year?
- Can you be claimed as a dependent by another taxpayer?
- Has your banking account or financial institution changed from last year which could affect your direct deposit or direct withdrawal?

Dependent Information

- Were there any changes in dependents from the prior year?
- Did you provide over half the support for any other person(s) other than your dependent children during the year?

Health Care Information

- If you had qualifying medical or dental expenses, please provide the total amount of the qualified medical expenses.
- While our office does not need actual medical receipts, please retain the originals for your own records.
- If you are a NJ Resident, did you and your dependents have health care coverage for every month of 2021?
- Did you enroll for Marketplace Coverage through the Affordable Care Act? If so, please provide Form 1095-A.
- If you have received distributions from a Health Savings Account (HAS/MSA), please provide Form 1099-SA.

Covid-19 Benefits

Stimulus Payments + Advanced Child Tax Credit

- How much did you receive for yourself, spouse, and dependents as Stimulus Payment (EIP3)? (Please provide IRS Notice 1444-C if received)
- If you received any unemployment benefit, please provide Form 1099-G from your state unemployment website
- If you received any Advanced Child Tax Credits, please provide IRS Form 6419

Section 3 – Important Tax Documents

Please review the following list of documents. When you have received all your tax documents for 2021, please upload them to your client portal accessible via **taxfirm.sharefile.com**. You may also drop off copies of these 2021 tax documents to our office. For your protection, please retain all original documents and provide our office with copies.

Personal Information

- New dependents for 2021? Please provide social security numbers and dates of birth
- New clients. Please include a copy of previous year Federal and State tax returns
- Please provide a copy of a voided check for direct deposit

Sources of Income

- Wage information statements / W-2
- Self-employment business income and expenses / 1099-NEC
- 1099-K – please provide if you received form 1099-K
- State or local taxes paid
- Commissions or tips received and paid
- Pension or retirement income / 1099-R
- Unemployment income / 1099-G
- Canceled Debt income / 1099-C or 1099-A
- Social Security income / SSA-1099
- Form K-1 from Partnership, Estate or S-Corporation
- IRA contributions and withdrawals
- Statements on the sales of stocks or bonds / 1099-B
- Cost basis of stocks sold
- Interest and Dividend Income/ 1099-INT + 1099-DIV
- Foreign Income or Foreign Taxes Paid
- Lottery or gambling winnings/losses
- State refund amount / 1099-G

Medical Expense + Grants

- Health Savings Account (HSA) / 1099-SA
- Health Insurance Marketplace Statement / Form 1095-A
- If you had qualifying medical or dental expenses, please provide the totals (we do not need actual receipts, please retain for your own records)

Mortgage, Rental Income + Real Estate Taxes

- Mortgage or home equity loan interest paid / 1098-INT
- Rental income and expenses
- Records of purchase, exchange, or sale of residence (HUD-1 statement)
- Real estate and personal property taxes paid

Miscellaneous

- Estimated taxes paid for Federal and any states
- Cash and non-cash charitable donations
- Educator expenses
- Tuition and Education expenses / 1098-T
- Student Loan interest / 1098-E
- Withdrawals from an education savings or 529 Plan
- Alimony paid or received
- Childcare expenses and provider information
- Official documentation for New Jersey's Veteran Exception / If this is your first year claiming the exemption, please provide Form DD- 214

To ensure a complete and accurate tax filing, please include any additional tax related forms not listed above with your document submission. Additionally, please advise your tax preparer of any additional forms received during your appointment.