

Welcome Back!

Express Tax Prep DROP-OFF

Instructions for Returning Clients

Please use our Welcome-Back packet to:

- ♦ Verify/Update Contact info
(i.e email, address, phone, dependents, filing status)
- ♦ Verify your **Current ID** is updated w/Receptionist
 - ♦ Sign & complete **ALL** signature forms
 - ♦ Enroll for Audit Protection Plan
 - ♦ Enclose **ALL forms & income statements**
(all originals will be returned after filing)
- ♦ Complete the **Check-List** of enclosed documents,
hand envelope to receptionist/ staff

If making Advance payment or Deposit
Remember to **Get Receipt** from Receptionist

Note: We will call you within **24 hours**,
*Give us a best time to reach you

Lillian's Professional Services

"We're Not Just Taxes"

Returning Clients

Express Tax Drop Off Check List - Check All Documents Enclosed

All Tax Clients

- ___ Completed Update sheet (ALL dep. SS#/DOB)
- ___ Photo ID (Updated)
- ___ **EIC form - Head of House**
- ___ **EIC Form Student Child Age 18+over**
- ___ **EIC Form Dep. other relationship**

Income Stmts.

- ___ W2 # _____
- ___ 1099M/1099R # _____
- ___ SSA (Social Security)
- ___ Debt Cancellation 1099C form
- ___ Unemployment
- ___ Healthcare 1095 A/B/C form

Deductions

- ___ Tuition 1098T Form
- ___ Student Loan Int. (Paid)
- ___ 529 College Stmt (1099Q)

Optional

- ___ E-file Signature (Consent/Disclosure)
- ___ **Audit Protection Plan (signature)**
- ___ Opt-Out Audit Protection

Name _____ Email _____

Tel. # _____ Best time to Call _____ AM PM

If "Itemize"

- ___ Church/Charity letters
- ___ Medical/Dental total Amt Paid
- ___ Gambling Income & Loss Stmt.
- ___ Property Tax Stmts.
- ___ Mortgage Stmts. _____

Landlords w/Tenants

- ___ Home Owner Deduction Sheet
- ___ List Expenses

Independent Contractors – (Self – Employed)

"Proof of Income/Expenses"

- ___ 1099Misc
- ___ Bank Stmts
- ___ Receipts (Sorted-categorized)
- ___ Expense Breakdown totals (Spreadsheet)
- ___ Auto Mileage Written details (if Applies)
- ___ **EIC Form Self-Employed – Ask Recept. (If applies)**

List Any other Misc Docs Enclosed

We're "Not Just Taxes" Tell Us How Else We Can Assist You