Collins & Company, P.C.
Certified Public Accountants

SENDING US YOUR TAX DOCUMENTS

Here are a few general guidelines to follow when sending us your tax documents…

1. We recommend mailing us all of your ***original*** tax documents (W-2s, 1099s, mortgage statements, etc.). We will return them to you upon completion of your returns.
2. If your employer or investment company provided multiple similar-looking forms, please send them all. Frequently there are slight, but significant differences on these tax forms so we need them all.
3. Make copies or scans of all documents prior to sending, especially those that would be hard to replace.
4. We recommend sending via FedEx or UPS for tracking purposes, but you don't need to send "overnight". Rates for 2 or 3 day shipping will be significantly cheaper.
5. Wait until you have 100% of your tax information before sending to us. Mistakes are made and time is wasted when information comes in piecemeal.
6. Before sending your information, please always review your prior year tax return to be sure that you are not missing any current year information.
7. Before sending your information, please always review Collins & Company's Client Tax Questionnaire (available at http://www.collinscpas.com/bulletin-board/). This questionnaire is designed to jog your memory about items people frequently forget. Please notate the items that pertain to you and return the questionnaire to us with the rest of your tax information.
8. If you made estimated tax payments (federal state and/or local), please confirm the date and amount of each individual payment.
9. If you have a small business (Schedule C / sole proprietorship), it's helpful if you summarize the income and expense items on a separate piece of paper. Use last year's tax return as a guide. We do not need to see expense receipts. Keep them in case the IRS asks for proof of your deductions.
10. If you have rental properties, it's helpful if you summarize the income and expense items on a separate piece of paper for each property. Use last year's tax return as a guide. We do not need to see expense receipts. Keep them in case the IRS asks for proof of your deductions.
11. If you have multiple real estate properties, it's helpful if you identify which mortgage statement belongs to each property.
12. If you give non-cash donations in excess of $500, we need to know the name and address of the charitable organization and a description and value (thrift store value) of the items given.
13. If you incurred costs for childcare, we need to know the name, address and tax identification number of the childcare provider, as well as the amount paid to the provider for each child.
14. If you deduct vehicle usage, we need to know your business mileage, commuting mileage (not considered business), and your personal mileage, as well as actual expenses for maintenance, gas and insurance.
15. A tax information organizer is available at http://www.collinscpas.com/bulletin-board/. Some of our clients find this organizer helpful in assembling their year-end tax information. Completion is optional. The organizer is available in .xls or .pdf formats.