

Tax Prep Best Practices

1. Give us your documents ASAP. The earlier in the tax season the better.
2. Make **copies** of your documents and **bring** the copies to our office.
 - **Give us the copies.** Always best to keep your originals with you in case something happens at our office (fire at our office, etc.). But if that's not convenient for you, you can give me the originals instead... you will get them back.
 - We **prefer you drop off your documents** at our office instead of emailing them or uploading them into our secure portal website. This ensures that we get every page. If you email or upload a bunch of separate documents, we have to be careful to print out each document so that we don't miss any.
 - If you decide you'd rather upload your documents, it's best if you email or upload the entire package as **one pdf document** not a bunch of separate pdf's. This helps us make sure we don't miss anything when printing out your pages.
3. Give us **all of your documents at one time.** Hold on to your documents until you have everything and then deliver them to us all at once. If you "piece-meal" your documents over several days or weeks, there is a good chance it might not make it into the file and it's less efficient (i.e. more costly to you) for us to keep pulling your file out to add more straggler documents. **Exception:** if you have everything except maybe a 1099 or K-1 that you might not receive until around or after the filing deadline, then go ahead and give us your file and we'll complete the return and just be waiting for the late documents.
4. **Don't staple documents.** Use paperclips instead if needed. We scan all your documents for our files, so it makes us less efficient if we have to pull out staples and then re-staple.
5. **We don't need your receipts.** We prefer to just get a listing of your expenses totaled by type of expense. For example.... Let's say you have a hand full of medical prescription receipts. You can keep the receipts but please list the amount of each receipt on a piece of paper and add them up to give us the total amount spent for prescriptions.
6. Make sure to give us all **original tax forms:** 1099's, W2's, K-1's etc., because we always enter off of original tax forms as opposed to a listing of the amounts.
7. Give us **"all pages"** of the 1099 statements not just a few summary pages and **eliminate any duplicate statements or pages.**