FLUSHING AREA SENIOR CENTER

TAX PREPARATION SERVICES

FLUSHING AREA SENIOR CENTER IS ONCE AGAIN COLLABORATING WITH KEVIN TRYON OF TRYON & ASSOCIATES LLC. KEVIN IS A PRIVATE TAX PREPARER WHO CAN ASSIST YOU WITH YOUR TAX RETURN PREPARATION AND PLANNING NEEDS.

IF INTERESTED, SIMPLY FOLLOW THE STEPS BELOW:

- COLLECT THE APPROPRIATE DOCUMENTATION UTILIZING THE ATTACHED CHECKLIST.

- CONTACT THE CENTER TO SCHEDULE A BRIEF APPOINTMENT FOR STAFF TO COLLECT THE CHECKLIST AND TAX DOCUMENTS TO BE SCANNED AND EMAILED TO KEVIN.

- ONCE COMPLETED, THE CENTER WILL CONTACT YOU TO SCHEDULE A MEETING WITH KEVIN HERE AT THE CENTER. AT THIS TIME, YOU WILL HAVE A CHANCE TO DISCUSS THE FILING, ASK ANY QUESTIONS AND SIGN THE REQUIRED DOCUMENTS TO BE MAILED OUT.

ATTACHED IS A PRICE LIST FOR SERVICES. FOR THOSE NEEDING JUST A 1040 FEDERAL AND STATE FILING, THE COST WOULD BE $75.00.

Tax Preparation Checklist

NAME: ______________________________ **DATE:** ______________________________

ADDRESS: ______________________________ **PHONE #:** ______________________________

EMAIL ADDRESS: ______________________________

This checklist will assist you in gathering relevant paperwork necessary for me to prepare your federal income tax return.

Tax Returns (If you are a new Client only)

- ☐ Copy of your completed 2021 Federal
- ☐ Copy of your completed 2021 State

Personal Data

- ☐ Social Security Numbers (including spouse, children, and other dependents)
- ☐ Birthdates (including spouse, children, and other dependents)
- ☐ Childcare provider tax I.D. or Social Security Number
- ☐ Copies of a divorce decree or other documents proving your right to claim a child living with your ex-spouse

Employment & Income Data

- ☐ W-2 Forms for this year
- ☐ Partnership and trust income
- ☐ Pensions and annuities (1099-R)
- ☐ Social Security (1099-SSA)
- ☐ Alimony received
- ☐ Jury duty pay
- ☐ Gambling and lottery winnings (Form W2-G)
- ☐ Prizes and awards (1099 MISC)
- ☐ Scholarships and fellowships (1099 MISC)
- ☐ State and local income tax refund (from taxing authorities 1099-G)

Homeowner/Renter Data

- ☐ Residential address(es) for this year
- ☐ Mortgage interest (Form 1098)
- ☐ Sale of your home or other real estate (Form 1099-S)
- ☐ Second mortgage interest paid (Form 1098)
- ☐ Real estate taxes paid in 2022 (Winter & Summer tax bills)
- ☐ Rent paid during the tax year
- ☐ Moving expenses

Financial Assets

- Interest income statement (Form 1099-INT & 1099-OID)
- Dividend income statements (Form 1099-DIV)
- Proceeds from broker transactions (Form 1099-B)
- Tax refunds & unemployment compensation (Form 1099-G)
- Miscellaneous income including rent (Form 1099-MISC)
- Retirement plan distribution (Form 1099-R)

Financial Liabilities

- Auto loans and leases (account number and car value**) if vehicle used for business**
- Student loan interest paid (Form 1098-E)
- Early withdrawal penalties on CDs and other time deposits

Automobiles

- Personal property tax information/registration information

Expenses

- Gifts to charity – Since 2007, there are new responsibilities. You will need a bank record (such as a canceled check, a bank copy of a canceled check, or a bank statement containing the name of the charity, the date, and the amount) or a written communication from the charity. The written communication must include the name of the charity, date of the contribution, and the amount of the contribution.
- Unreimbursed expenses related to volunteer work – you can deduct any driving expenses for volunteer or charitable work.
- Sales Tax Expenses – any large purchases (car, boat, furniture); only if you plan to take the sales tax deduction on Schedule A (itemized deductions).
- Education expenses (for education deductions Form 1098-T)
- Child care expenses
- Medical Savings Accounts – please bring all documentation regarding contributions and distributions; please contact the institution handling the account.
- Adoption expenses
- Tax return preparation expenses and fees

Self-employment Data

- K-1s on all partnerships
- Receipts or documentation for business-related expenses
- Farm income

Deduction documents

- Federal, state and local estimated taxes paid for current year, including estimated tax vouchers, cancelled checks & other payment records
- IRA, Keogh & other retirement contributions

- **Medical Insurance Coverage (Did you have health insurance coverage during 2022)**

- Medical expenses (receipts for unreimbursed medical, miles driven for medical related purposes, and insurance premiums paid out of pocket for accident and health and qualified long term care)

- Casualty or theft losses

TRYON & ASSOCIATES LLC TAX PREPARATION FEES 2023

	FORM OR SCHEDULE	PRICE		SENIORS RATE
	1040 FEDERAL	**$75.00**		**$50.00**
	1040-X FEDERAL	$50.00		
	SCHEDULE A FEDERAL	$0.00	Included	
	SCHEDULE B FEDERAL	$0.00	Included	
	SCHEDULE C AND C-EZ FEDERAL	$25.00	TO	$100.00
	SCHEDULE D FEDERAL	$10.00	TO	$50.00
	SCHEDULE E FEDERAL	$25.00	TO	$50.00
	SCHEDULE SE FEDERAL	$0.00	Included	
	FORM 1065 FEDERAL	$75.00	TO	$150.00
	FORM 1120-S FEDERAL	$100.00	TO	$250.00
	ALL OTHER FEDERAL FORMS	$10.00	TO	$100.00
***	**PRICES FOR STATE RETURN PREPARED WITH YOUR FEDERAL RETURN**			
	MICHIGAN 1040 OR ANY OTHER STATE	**$25.00**		**$25.00**
	MICHIGAN 1040-CR	$10.00		
	MICHIGAN 1040-CR7	$0.00		
	MICHIGAN 1040-X	$50.00		
	FORM 4884 PENSION SCHEDULE	$0.00		
	MICHIGAN SCHEDULE 1	$0.00		
	MICHIGAN SCHEDULE W	$0.00		
	MICHIGAN SCHEDULE NR	$0.00		
***	**PRICES FOR CITY TAX RETURN PREPARED WITH YOUR FEDERAL RETURN**			
	CITY 1040 OR 1040-NR	**$25.00**		**$0.00**
	ALL OTHER CITY FORMS	$0.00		
	ALL OTHER CITY SCHEDULES	$0.00		
***	**PRICES FOR SMALL BUSINESS TAX RETURNS VARY PLEASE ASK FOR A QUOTE**			

PRICES ARE GOOD FOR THE ENTIRE CALENDAR YEAR OF 2020 AND INCLUDE ANSWERING ANY QUESTIONS YEAR ROUND IN RELATION TO YOUR TAX RETURN.

THANK YOU FOR YOUR BUSINESS!!!!