

# 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 2023 Federal
- Copy of your completed 2023 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 2024 (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)
- Childcare expenses
- Medical Savings Accounts – please bring all documentation regarding contributions and distributions; please contact the institution managing 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 2024

FORM OR SCHEDULE	PRICE	SENIORS RATE
<b>1040 FEDERAL</b>	<b>\$75.00</b>	<b>\$50.00</b>
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
<b>*** PRICES FOR STATE RETURN PREPARED WITH YOUR FEDERAL RETURN</b>		
<b>MICHIGAN 1040 OR ANY OTHER STATE</b>	<b>\$25.00</b>	<b>\$25.00</b>
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	
<b>*** PRICES FOR CITY TAX RETURN PREPARED WITH YOUR FEDERAL RETURN</b>		
<b>CITY 1040 OR 1040-NR</b>	<b>\$25.00</b>	<b>\$0.00</b>
ALL OTHER CITY FORMS	\$0.00	
ALL OTHER CITY SCHEDULES	\$0.00	
<b>*** PRICES FOR SMALL BUSINESS TAX RETURNS VARY PLEASE ASK FOR A QUOTE</b>		
<b>PRICES ARE GOOD FOR THE ENTIRE CALENDAR YEAR OF 2020 AND INCLUDE ANSWERING ANY QUESTIONS YEAR ROUND IN RELATION TO YOUR TAX RETURN.</b>		
<b>THANK YOU FOR YOUR BUSINESS!!!!</b>		