

Thank you for your interest in Lucy's Tax Service, LLC

This year we will be raffling off a 65" inch smart tv for our clients we will announce the winner on April 20th. In addition to excellent stress free service we also offer Fast cash Advance starting January 2nd of \$500 up to \$6,000.

DUE TO COVID and STIMULUS CHECKS please read and send or bring everything that applies to you on this list. I take the time to type this and make videos to prevent delays and errors on your returns please take the time to read and send everything I need me and my staff will greatly appreciate it thank you so much. 😊

What to bring or send to me attn: Lucy Guzman: Video of what to bring : <https://youtu.be/R31ShTBPIok>

PERSONAL INFORMATION- IF EXISTING CLIENT JUST MAKE SURE I HAVE EVERYTHING CURRENT:

Current mailing address, an email address and cell phone number , Identification (Drivers license) social security cards, dates of birth, direct deposit info- routing and account number (and no that info is not on your debit card USUALLY ON YOUR

CHECKS) - **NEW CLIENTS PLEASE SEND ME YOUR 2020 TAX RETURN OR YOUR MOST RECENT LAST FILED RETURN.**

INCOME AND OTHER TAXABLE DOCUMENTS

FORM W2 from all jobs in 2021 (or **last pay stubs from all jobs you had in 2021-** make sure the year to date earnings and withholdings are listed) ,

IF YOU HAD ANY SALES OF STOCKS I NEED FORM 1099, INTEREST INCOME AND DIVIDENDS, CANCELLATION OF DEBTS

IF YOU ARE RECEIVING SOCIAL SECURITY 1099-SSA I NEED THAT FORM OR AMOUNTS AS WELL.

IF YOU RECEIVED UNEMPLOYMENT I NEED YOUR FORM 1099-G UNEMPLOYMENT BENEFITS RECEIVED you received for 2020.

If you withdrew 401K please send me 1099-R

Homeowners if your itemizing I need mortgage int statement FORM 1098MORT INT, property taxes, charitable contributions, unreimbursed employee expenses,

COLLEGE CREDITS- TUITION PAID 1098-T if applicable.

STIMULUS CHECK AMOUNT RECEIVED BOTH CHECKS (3rd STIMULUS CHECK AMOUNT):

I need to know exactly how much you received for your 3RD STIMULUS CHECK the date was it direct deposit, a check or a debit card.

CHILD TAX CREDIT DEPOSITS FOR CHILDREN 6-17 YEARS – DID YOU RECEIVE THESE PAYMENTS IF SO WHAT WAS YOUR MONTHLY DEPOSIT AMOUNTS

[Advance Child Tax Credit Payments in 2021 | Internal Revenue Service \(irs.gov\)](#)

IF YOU HAD OBAMACARE- HEALTH INSURANCE THROUGH THE MARKETPLACE-

We need the form **1095-A.**

DID YOU HAVE ANY LOSSES DURING THE TEXAS WINTER FREEZE IN FEBRUARY 19TH OF 2021? If so please specify the THE TYPE OF LOSSES AND THE AMOUNT OF THE LOSSES.

If you are self employed we need proof of income such as Form 1099NEC, bank statements

IF YOU DON'T HAVE ACCURATE AMOUNTS WE CAN USE AN ESTIMATED AMOUNT OF INCOME AND EXPENSES BUT IN ADDITION I WILL NEED THE FOLLOWING AS WELL.

Monthly income coming in from business, monthly expenses, phone, auto gas, materials and supplies, repairs, insurance paid, cell phone, meals expense, utility bills paid, groceries, monthly mortgage paid, or monthly rent paid.etc. etc.

New office location is 8402 BASCOM Houston tx 77080 Email: lucyguzman99@yahoo.com Fax: 1-866-362-3973

TO MAKE AN APPOINTMENT PLEASE DO SO HERE: WWW.LUCYSTAXSERVICE.NET

You can SEND ME THE DOCUMENTS TO MY EMAIL: lucyguzman99@yahoo.com

Gracias por su interés en Lucy's tax service ..

Este Año vamos a estar rifando una television de 65" para nuestros clients el ganador sera anunciado Abril 20th.
Tambien tenemos adelantos de \$500-\$6,000 en tu reembolso.

Que traer o mandarme para preparar tu reporte:

Si eres cliente existente solo dame lo que no tenga actualizado en tu expediente. Si tienes nueva direccion, numero de celular, correo electronico o si tuviste un bebe o un nuevo dependiente o se caso etc. etc.

Y si eres nuevo cliente necesito el reporte del ano 2020 o el ultimo reporte que hiciste
tu estado civil: si eres Casado, soltero, o cabeza de familia
necesito actas de Nacimiento, Seguro social, identification que no este expirada tuya y de tu esposa (O).
Cuantos dependientes tienes o sea hijos y sus edades, si cuidas de otras personas en tu hogar Tambien incluye a ellos.

Ingresos: tienes tu 2021 w-2, Ultimo talon de cheque (asegurate que sea el ultimo talon)

Si recibiste unemployment necesito forma 1099-G

Si recibiste o recibes una 1099-Misc (trabajas por tu propia cuenta? Necesito total Ganado y los gastos para el ano 2021.

Eres dueño de casa? Necesito la forma 1099-Mort Int el total de interes que se pago al ano y las taxes de real estate que se pagaron. Contribuciones a la iglesia.

Si tienes hijos en el colegio y estas pagando o tienen prestamos necesito la forma 1098-T.

El 3RD cheque de STIMULUS que se dio necesito la fecha que depositaron y la cantidad que recibiste.

[Advance Child Tax Credit Payments in 2021 | Internal Revenue Service \(irs.gov\)](#)

LOS ADVANCE CHILD TAX CREDIT PAYMENTS POR NINOS MENORES DE 6 A 17 ANOS.- Necesito las cantidades que recibiste.

Si tuviste **Obama care necesito la forma 1095-A**

mi cobro por mis servicios depende en las formas que se usan en tu reporte de impuestos.

Mi fax: 1-866-362-3973, email: lucyguzman99@yahoo.com, por texto: 832-215-4140

Attn: lucy guzman

Quieres hacer cita para venire en persona aqui esta la link para hacerlo: <https://www.fresha.com/lucys-tax-service-xqh9yuza>

Por favor este a tiempo y si tienes que cancelar me tienes que avisar con 24 horas de antemano

Mi direccion es 8402 Bascom, Houston, tx 77080.

Video de que traer a tu cita : [Lista de lo que se necesita para preparar tu reporte de impuestos - YouTube](#)

Lucy Guzman, Tax Preparer ENROLLED AGENT

www.lucytaxservice.com

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