

How to Organize Documents/Document Deadline

*PLEASE SEND THE INFORMATION TO YOUR REP BY _____

- Attach each copy of the cancelled check or other proof of payment to the related bill.
- Categorize expenses into envelopes according to the line on which they were reported on the tax return.
- Run tapes or provide an itemized Excel sheet of the amounts in each category and attach to the envelope.

Quick Guide to Preparing Documents

(1)

Compile your receipts and other “proofs of payment” according to the categories on your return.

(2)

Copy the receipts and your “proof of payment.” Keep the original receipts in a safe place for your future reference.

PROOF OF PAYMENT: Attach each check copy to the receipt or invoice. For bank or credit card statements reference each receipt to it's entry on the statement and arrange in date order.

PLEASE DO NOT USE HIGHLIGHTER

(3)

Total the receipts using calculator tape for each category. If the total does not match the return, please explain. Attach the tape to the copies that they represent.

NOTE: A work sheet or bookkeeping printout may be used instead of the calculator tape.

Please Make Sure You:

- Send COPIES ONLY.
- Use letter size paper and copy on only ONE side of the page.
- Checks should be copied on both the front and back.
- Send only ONE copy of each bill or proof, and only the documents specific to the questioned item.
- Organize the copies in DATE order.
- Verify that all of the copies are LEGIBLE.