# ***Berardi***
## ***Accounting Group***

Dear Valued Client: January 14, 2020

Greetings! It is time to gather your tax information for your ***2019 Income Tax Return*** preparation. We are sending this helpful list to assist you but also suggest you use a copy of last year's return as a guide.

- ❑ Changes of marital status, name, address, phone numbers, email address and identity protection pin #.
- ❑ Your account number and bank's routing number if you prefer direct deposit of refund.
- ❑ New dependent information; include social security number and date of birth.
- ❑ Estimated tax payments (if paid).
- ❑ All income, including Forms W-2 for wages, 1099Misc, K-1s, gambling winnings and unemployment.
- ❑ Forms 1099R regarding pensions, IRA distributions and/or form 1099SSA social security benefits.
- ❑ Forms 1099 for interest, dividends and capital gains. Include brokerage account statements dated 12/31/19.
- ❑ Income and expenses from rental property.
- ❑ Business expenses related to self-employment income.
- ❑ Forms 1099A if health insurance through the Affordable Care Marketplace.
- ❑ Traditional IRA and/or Roth IRA and/or HSA contributions made for 2019.
- ❑ Alimony Received or Alimony Paid (initiated prior to 2019).
- ❑ Statements of payment of mortgage interest, property taxes, medical expenses, charitable contributions and gambling losses.
- ❑ Receipts from major home improvement and/or vehicle purchase that generated Florida sales tax.
- ❑ Closing Disclosure(s) from home purchase and/or sale (include original Settlement Statement), refinance or equity line of credit.
- ❑ Daycare / Aftercare / Summer Camp /Dependent Care details; amount paid, address & Tax ID# of provider.
- ❑ Forms 1098T tuition payments, books, supplies, equipment and / or student loan interest paid.
- ❑ Purchase of solar energy efficient home improvements or plug-in electric vehicles.

We are grateful for the opportunity to serve you and would appreciate your recommendation on Google and to family, friends, and colleagues. Be assured that they will receive our best service and that all meetings are confidential. As always, my wife Cheri will be assisting this year and is also available to discuss tax deferred CD-like annuities.

Contact us when you are ready for an appointment or you may simply drop-off, mail, fax or email your information. We would like to make filing an accurate tax return as convenient as possible. Our office hours are *Monday-Friday, 9am to 6pm and Saturday, 12 noon to 5pm*.

We look forward to hearing from you. Thank you.

Sincerely,

Richard Berardi, E.A.
Accountant

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