

Office Locations:

**85 Park Street Rear
Stoughton, MA 02072**

Open Monday through Saturday

**70 Longwood Ave*
Onset, MA 02558**

Open Tuesday, Thursday, & Sunday

**Entrance in rear, by the driveway*

Phone: 508-587-0744 · Fax: 508-580-4084

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*****CHECKLIST OF INFO NEEDED*****

- ID'S FOR ALL TAXPAYERS
- SOCIAL SECURITY #'S AND DATES OF BIRTH FOR ALL TAXPAYERS AND DEPENDANTS
- EMAIL ADDRESS TO LEAVE ON FILE FOR COPIES AND INFO TO BE SENT TO YOU
- BANK ROUTING # AND ACCOUNT # FOR DIRECT DEPOSIT OF REFUNDS
- W2'S 1099R'S W2G'S FOR WAGES PENSIONS IRAS AND GAMBLING WINNINGS
- 1099R'S FOR UNEMPLOYMENT INTEREST AND DIVIDENDS
- 1099S'S FOR SOCIAL SECURITY INCOME
- ALIMONY EITHER PAID OR RECEIVED AND SS# OF RECIPIENT
- DETAILED INFO ON STOCK SALES SUCH A GAIN LOSS REPORT FOR BROKER AND 1099B
- 1099'S FOR COLLEGE EXPENSES
- 1098T WITH PROOF OF PAYMENTS BY YOU LOAN SCHOLARSHIPS OR GRANTS WITH DATES OF PAYMENTS
- STUDENT LOAN INTEREST STATEMENT
- RECORD OF ANY ESTIMATED TAXES PAID DURING THE YEAR
- CHILD CARE EXPENSES PROVIDE NAME ADDRESS AND FED TAX ID#
- PROOF OF RESIDENCY OF ALL DEPENDANTS UNDER AGE 17
- AMOUNT OF RENT PAID DURING THE YEAR
- 1099HC FOR HEALTH INSURANCE

*****TAXPAYERS WITH ITEMIZED DEDUCTIONS*****

- REAL ESTATE TAXES AND AUTO EXCISE TAXES
- MORTGAGE INTEREST PAID ON ALL MORTGAGES AND HOME EQUITY LOANS
- MEDICAL EXPENSES ONLY IF THEY EXCEED 7.5% OF ADJUSTED GROSS INCOME OVER AGE 65 AND IF THEY EXCEED 10% OF UNDER AGE 65 (WE NEED TOTALS YOU KEEP YOUR RECEIPTS)
- TOTAL OF CHARITABLE CONTRIBUTIONS MADE BY CASH AND CHECK ONLY IF YOU HAVE RECEIPTS. SEPERATE TOTALS FOR CASH AND NON CASH DONATIONS (SUCH AS CLOTHES AND FURNITURE) BUT ONLY IF YOU HAVE YOUR RECEIPTS
- WORK RELATED EXPENSES SUCH AS UNION DUES, UNIFORMS, USE OF YOUR VEHICLE OTHER THAN COMMUNTING, TOOLS AND EQUIPMENT PURCHASED TO DO YOUR JOB
- INVESTMENT EXPENSES, ADVISORY FEES AND TAX PREP FEES

*****BUSINESS AND RENTAL ACTIVITIES*****

- COPIES OF ALL 1099S RECEIVED AND 1099K IF YOU ACCEPT CREDIT CARD PAYMENTS
- ALL INCOME AND EXPENSES FROM THAT ACTIVITY-TOTAL BY CATEGORY OR TYPE OF EXPENSE. UNUSUAL EXPENSES MAY NEED DOCUMENTATION
- WE MAY ASK TO SEE LOGS AND RECEIPTS

*****CIRCUIT BREAKER CLIENTS*****

- IF YOU OR YOUR SPOUSE ARE OVER 65 AND YOU DO NOT LIVE IN SUBSIDIZED HOUSING AND HAVE LIMITED INCOME WE NEED TO SEE THE FOLLOWING:
- REAL ESTATE TAXES, EVEN IF YOU DO NOT ITEMIZE OR EVEN FILE A RETURN
- WATER BILL AND ASSESSED VALUE OF THE HOME
- RENT PAID AND LANDLORDS NAME AND ADDRESS

*****NEW CLIENTS MUST PROVIDE THE FOLLOWING*****

- A COPY OF LAST YEARS TAX RETURN
- PHOTO ID SUCH AS A LICENSE
- SOCIAL SECURITY CARDS FOR ALL TAXPAYERS AND DEPENDANTS