HELPFUL TAX FILING TIPS

As we are entering the busy part of our tax season, we wanted to pass along some helpful tips for our clients to help make this tax season efficient for all.

- Please provide all tax documents at one time. If we receive all documents at once via email, mail, or drop off there is a much better chance everything is accounted for. Unfortunately, if we receive items at different times from clients via text, email, mail, there is a higher chance something gets missed.

- We complete all tax returns on a first in first out basis. The tax return is considered "in" when we have all documents necessary to complete the tax return.

- Please review your prior year documents to see if you're missing anything before you send in for tax preparation. Saving our tax preparers from numerous client calls for missing information helps us to prepare your return faster.

- Review your books for before sending in. Many times accounting errors can be caught if the client reviews their documents before sending to us. For example, are expenses in income categories? Do you have equipment transactions all listed in a separate account? Are some equipment loan payments listed in an expense account?

- Please ensure all handwritten notes or scanned documents are legible.

- Make sure that you provide all purchase/trade documents for vehicle, equipment, and other large asset purchases. Many times if items are purchased via loan there is no corresponding expense on your books.

- Let your preparer know of any major life changes. Married? Divorced? New child? Receive an Inheritance? These are all things that affect your tax return. The more we know, the more we can help!

- We have a dropbox located in the alley behind our office if you need to bring documents before or after hours. We recommend placing any documents in an envelope.

- Our tax season office hours are Monday – Friday 8:30AM – 5:00PM

We appreciate your business and look forward to another great tax filing season!

Your Tax Team at Kaup's

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