Stevenson Tax and Accounting, Inc.

Phone: 847-337**-**0794Fax: 224-230-4998

Email: [karen@karenmstevenson-ea.com](mailto:karen@karenmstevenson-ea.com) website: [www.karenmstevenson-ea.com](http://www.karenmstevenson-ea.com)

Best wishes for a wonderful 2023! We appreciate your past business and look forward to the privilege of serving you.

**Please upload your tax docs to your portal. It has e-signature capability and an easy online tax organizer. We encourage everyone to use the portal if you’re able.**

You can access your portal here:

<https://myportal.karenmstevenson-ea.com/login>

You can instead drop your documents through the mail slot in the suite door or send them by mail, UPS, or FedEx. ***You do not need an appointment* *to drop off documents. Please drop them through the mail slot in the suite door at any time.***

Engagement Letter/Privacy Policy: Please ***sign and return the enclosed (yellow*).**

Tax Organizer: *Use the online tax organizer in your portal or return the tax organizer on page 2 of this* *letter*. You can instead use your own system to gather documents.

Payment: We accept checks, cash, Zelle (847-337-0794), Apple Pay (847-337-0794), and Venmo (K-Stevenson-11). *We accept credit cards with an additional 4%.*

When your tax returns are completed, you will be able to e-sign, we can mail completed tax returns to you via USPS Priority Mail, or you can come into the office to sign and pick up.

As always, Bethany, Emma and I are happy to answer questions.

As an FYI, the office management has locked the back door, so please come in the front.

Thank you for your continued business and the opportunity to serve you. We know you have a choice when it comes to tax preparation.

Best Regards,

Karen M. Stevenson, EA, MBA

**Tax Organizer -** or instead use the online one in your portal

Please bring all W-2 forms, 1099s, 1098s, and all other tax forms.

One-time requirement: Provide a birth certificate or SSN card for each dependent.

Did all dependents live with you for more than 6 months of the year? Y N

Did you provide more than 50% of your child(ren)’s support? Y N

**Did you buy, sell, trade, or otherwise acquire cryptocurrency in 2022? \_\_\_\_\_\_\_\_\_\_\_**

**For homeowners: How much did you receive for the IL Property Tax Rebate?\_\_\_\_\_\_**

Provide a copy of your driver’s license.

Did you have Obamacare health insurance? If yes, please provide the 1095-A.

Did you buy a new car? Sales tax paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Provide all 1098-T forms for all college students.

If you own your home: What county: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ PIN \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Provide 1098 for mortgage interest and property tax paid.

Medical expenses out of pocket over 7.5% of income? Total amount: \_\_\_\_\_\_\_\_\_\_

Amount of charitable donation by check or credit card ***for non-itemizers***, up to $300 (single) or $600 (married)\_\_\_\_\_\_\_\_\_\_

Total charitable giving via check or credit card, if over $300 or $600: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Total non-cash charitable donations e.g. Goodwill, AmVets, etc.: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If the total of non-cash donations is over $500, please list:

Date of each donation, to which charity given and the value of each donation

If you had *self-employment income*, please provide:

All 1099 forms and total income and all expenses, broken down by category

If you *rented a property to others*, please provide:

Total income and all expenses, broken down by category

Does your child(ren) go to private school? Provide the statement of tuition paid.

Public school: Provide school name and registration fees paid for each child.

Bank routing and account number for direct deposit:

Routing #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bank Account #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dates and amounts of quarterly estimated payments paid to the IRS and to IL.