



January 4, 2022

Dear Valued Premier Client,

As we enter the filing season for the 2021 tax year, safety is our top priority. As we continue practicing the recommended guidelines for reducing the risks of COVID-19, we are limiting face-to-face interactions at the office this year. Please continue reading for more information on our tax preparation procedures this year.

Premier is offering a couple of “no to low contact” methods for your tax preparation this season. As part of this process, we are asking you to use one of the following methods to submit your tax documents to your preferred tax preparer:

1. **Virtual Option:** Scan digital copies of your tax documents as a PDF and upload them to our secure, online portal through our website (premieraccounting.net) or using your existing Premier Citrix Files/ShareFile account. If you wish to securely upload through our website, see the enclosed instructions with this letter. You may also share your documents with us using your own **Google Drive, Dropbox, OneDrive** or **iCloud Drive** account.
2. **Drop-Off Option:** Drop-off or mail your paper documents to our office. **Please make sure to include your contact information.** If you intend to drop-off at the office, please contact us to make arrangements prior to visiting the office.

Upon receipt of your tax documents, your preparer will complete your tax return and contact you to schedule a time to review your tax return. This review will be conducted using a web conference meeting, phone call, or other method agreed upon between you and your tax preparer.

If you have any questions about the process or would like assistance, please contact one of our Client Care Team Members at **(815) 633-9706** or help@premieraccounting.net.

Please help us to make sure we have the most up-to-date address, phone numbers and email addresses for you.

As a reminder, payment for tax services is due prior to us filing the tax return on your behalf. We appreciate your understanding.

Our 2021 Tax Season Team			
Steve Kwon	Didi Finch	Dian White	Bev Joyce
Peyton Munch	Marnie West	Julette Wade	Ricardo Suarez
Sounantha Cheng	Gina Backes	Tom Glover	

Thank you for your continued business and support. We look forward to an amazing (and safe) tax season!

Regards,

Steve Kwon and Tom Glover

To ensure that we have everything we need to process your tax return efficiently, make sure that you bring **EVERYTHING THAT APPLIES** to your situation.

IMPORTANT NEW FORMS FOR 2021:

1. **Letter 6419** – ACTC (Advanced Child Tax Credit) Notice
2. **Letter 6475** – Third Economic Impact Letter

Here is a general list for most taxpayers:

1. Driver's license(s) for taxpayer and spouse (***ID verification is required for all tax filings***)
2. Social Security cards for taxpayer and spouse (new clients only)
3. Dependents' Social Security cards and Dates of Birth (new dependents in 2021)
4. Direct Deposit Information – If you want your refund directly deposited, include your Routing and Account number
5. Child Care Expenses & Provider Information (Name, Address, and Employer Identification Number for provider)
6. Wage Statements – **Form W-2(s)** – We need ALL forms. If you are missing a W-2, please contact your employer to get a copy.
7. Interest and Dividend Income – **Form 1099-INT/Form 1099-DIV/1099 Composite Statement**
8. Pension or Retirement income – **1099-R**
9. Self-Employed Business Income and Expenses (expenses should include all costs of running the business, including mileage log) – **1099-Misc/1099-NEC/1099-K**
10. Social Security Income - **SSA-1099**
11. Sales of Stocks or Mutual Funds – **Form 1099-B** – In addition, we need the stock basis (how much you paid– You can get this from your brokerage firm), date stock was originally purchased, name of stock and number of shares sold.
12. Unemployment Income - **Form 1099-G** (this may vary by state) Bring in whatever form the state uses to report unemployment compensation benefits. You may need to check your online account for the actual form.
13. Lottery or Gambling Winnings – **Form W-2G** and records of all gaming sessions.
14. All records for Cryptocurrency (Bitcoin, etc.) transactions.
15. Educator Expense – Money spent out-of-pocket as a teacher (K – 12)
16. Tuition and Education Fees; Including costs of all books purchased – **Form 1098-T** (required to receive credit); statement of tuition & fees paid in 2021 (out of pocket or from loan proceeds).
17. Student Loan Interest – **Form 1098-E**
18. Estimated Payments – amounts and dates of payments made for 2021 tax year
19. Health Insurance – **Form 1095-A** (Marketplace Insurance)
20. 529 Plan contributions.

Please review the following checklist of Itemized Deductions:

21. Mortgage, Refinance or Home Equity Loan Interest Paid – **Form 1098**
22. Real Estate Taxes Paid - Must have your Parcel ID # (for an IL Tax Return).
23. Sales Tax Paid on Cars, Trucks, Boats, or other large purchase items.
24. Cash and Non-Cash Charitable Donations –If non-cash charitable contributions exceed \$500, we need the name, address and Federal Identification Number – a list of all cash and non-cash contributions is fine, but a receipt is needed for ALL contributions
25. Miles driven for volunteer and charitable purposes
26. **Medical Expenses Checklist (7.5% of Adjusted Gross Income)**
 - 26.1. Doctor, Dentist, Optometrist Fees, & Chiropractic Services
 - 26.2. Medical, Dental & Long-Term Care Insurance Premiums
 - 26.3. Prescription Medications - Insulin, birth control; Contacts, including supplies - Saline & enzyme cleaners
 - 26.4. Hearing Aids, including batteries; Dentures, including supplies and cleaners
 - 26.5. Miles driven for medical purposes
27. Any form that states "**Do not throw away, Tax Document**"