St. Sauver & Szabla CPA's
MAKING TAXES LESS PUZZLING

PLEASE READ!!!! IMPORTANT INFORMATION!!!!!

Hello!

It's hard to believe how fast time flies—tax season is here once again, and there have been many changes in tax law this year. We are prepared and excited to assist you with your tax needs.

*** Please read this page at a minimum.**
* This serves as the **checklist of requirements** for processing all tax returns.
* If these steps are **not completed before your appointment or drop-off**, additional time will be required and **extra fees may apply**.

✔ REQUIRED FOR EVERYONE

☐ **Sign your engagement letter.**
We cannot begin processing your tax return without this.

☐ **Complete the full questionnaire (4 pages, front and back).**
If you need help, Lucy is available for **January appointments at no additional cost**. The questionnaire must be completed before we begin your return.

☐ **Verify your mailing address, email, & bank information** on the Personal Information Page.
The IRS now requires direct deposit information and will **no longer mail paper refund checks**.
The IRS is also no longer accepting payment via paper check.

☐ **Remove paperwork from envelopes and organize into a neat stack** with **no staples, tape, or multiple paperclips**.
We scan all paperwork—including appointment clients.
A $30 surcharge may be added if we must open your mail.

SENIORS/SOCIAL SECUIRTY RECIPIENTS

☐ According to the Social Security Administration your SSA-1099's are no longer automatically mailed out to every individual. You may need to log into your online account and request it to be mailed.

If you want help changing your SSA online settings, Lucy can assist with a **December or January appointment at no cost** for current clients.

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