

## Tax Preparation Tips

Here are some hints to make the tax preparation process move quickly, keeping costs to a minimum:

- Open your mail before meeting with your tax advisor. We don't need to see the envelopes and we don't want to charge you for opening and sorting your mail.
- Group like items together. Crumpled receipts in a shoe box take time to straighten and organize. Let us spend time on your account focused on tax issues not organizing.
- Don't add staples to the package. We have to remove each staple to scan the documents for the electronic file. If you find it necessary to affix documents, use clear scotch tape, but be sure you are not covering other relevant information.
- Add notes regarding new or unusual transactions during the year. Don't assume we will remember a casual conversation from earlier in the year.
- Deliver your information as soon as possible in the season. Even if you are missing a few pieces, we can do a large percentage of the preparation, pending receipt of the final documents.
- Remember, you are not the only procrastinator. If you are bringing initial information within the week of a deadline, keep in mind that you are not the only person doing so. Each procrastinator is sure that we have completed every return except theirs. If only that were true! While we make every effort to meet the government deadlines. We cannot guarantee timely preparation when initial information is received within the last week of the deadline.
- We are just the messenger. We are working with the facts as presented by you. We want to work with you to get the best answer allowed by law, but remember we do not write the laws or the facts, we merely interpret them.