The enclosed checklist is <u>not required</u>, it's only to help jog your memory, so don't stress about it.

(A detailed personalized list is available by request.)

Personal Information Needed:

- Earned income (W-2s, 1099-Misc, 1099-NEC, Unreported Income)
- Interest/Dividend/Stock Trades (1099-INT, -DIV, -B)
- 1098 from mortgage company for interest/property tax on your home.
- Sch A deductions (Property Tax, Home Interest, Charity, Medical) if more than $12,000 single/ $24,800 married
- Major Purchases (New Home, Vehicle)

Small Business Information Needed:

- 1099's received from employers.
- Copy of W-2s or 1099s you sent out to your employees or contract laborers.
- Your calculations of total income.
- Your business expenses – broken out the same as last year (or call for guidance).
- These can be provided as paper logs, Excel worksheets, or a Quickbooks file.

CORPORATE, LLC AND PARTNERSHIP RETURNS ARE DUE MARCH 15TH!!

TAX RETURNS ARE DUE 4/15/2021

You can call to make an appointment, mail in your information, or upload to the portal.

Due to our high volume of clients, you should allow 4 weeks from the date of submission.

We will always call you to discuss your tax return before we finish it and we will always supply you a form for your signature and a copy for your file.

We don't open your envelope until it comes up in the rotation. If there is an urgent message enclosed, call and let us know to open it when we receive it.

Anything received after <u>April 1st</u> will probably be extended.

Call (512-259-4404) if you need an extension, there is no charge for this service.

BRATTON FAMILY TAX AND BOOKKEEPING SERVICES INC

Chris Bratton, EA

Barbara Bratton, CPA

Tamara Haas, Office Mgr

PO BOX 2242
Leander, TX 78646

Office: (512)259-4404
Fax: (512)259-0392

brattonbiz@gmail.com

PHYSICAL ADDRESS*:

3236 HERO WAY
Leander, TX 78641

*GPS programs may have trouble finding this address. A map is available via e-mail on request.

Payment is due upon completion.

Rapid Refund Loans are not available.
There is no additional charge for electronic filing.

CHANGES FOR 2021

- We encourage you to send us your information by the mail or the Online Portal. If you request an In-Person appointment there will be an additional $25 fee assessed.

GENERAL REMINDERS

- Expenses are still allowed on Sch C Self Employment and Sch E rental properties.
- If you feel your deductions will be more than $12,400 ($24,800 Married) then send:
    a. Home Mortgage 1098
    b. Medical Out-Of-Pocket Costs.
    c. Sales Tax from Vehicle Purchase.
    d. Charitable Contributions.
- Education Credit - If your child is in college, we need Form 1098-T to calculate the college credit.
- We still need your Drivers License information, but only if you haven't given it to us previously or if you renewed it during the year.

As a reminder, you can no longer claim any expenses against W-2 income (i.e. mileage, home office, supplies, etc). These expenses are still allowed with 1099 income.

BASIC RATES 2021

INDIVIDUALS:

Basic Federal Return (Includes Insurance and Postage)	$250
State returns	$100 base
Amended returns	$100 base
Add'l Schedules	
Complex (C,D,E,F)	$50 base
Other Forms	$10 base
Simple Return (W-2 only)	$100

We will do your minor child's return for free in order to coordinate them with your return.

BUSINESS:

Form 1065 Partnerships & LLC	$450 base
Form 1120 & 1120S Corp	$450 base
Form 990 Non-Profit	$450 base
990-N (postcard)	$100
Franchise Tax Report	$50

We reserve the right to adjust these prices up or down based on complexity.

OTHER CHARGES:

In office appointment	$25
Certified mail/proof of delivery	$12
Bookkeeping	$65/hour
Payroll Processing	$65/hour
Payroll Reports	$50/quarter

Other tax issue resolution services (Audit, Offer in Compromise, Penalty Abatement, Etc.) offered by quote.

REPORTING HEALTH INSURANCE

If you received Health Insurance through the Marketplace, your 1095-A is still required to file your return.

Other than that, we still need to know if and/or how you had health insurance, but only for tracking purposes.

Information NOT Needed:

Please do **NOT** send your receipts unless you want US to add them up. This will ***significantly*** increase your cost of tax preparation.

You **WILL** need your receipts if you are audited, but we accept your word for income and deductible expenses.

DONATIONS OF GOODS

MUST be listed and priced before they can be deducted. Prepare a list of goods given, your best guess as to the fair market value and a copy of the receipt of contribution from the agency. Goodwill and Salvation Army have lists of values on-line.