



728 W. 11 MILE RD.
MADISON HEIGHTS, MI 48071

John's Tax & Financial Service with Paula and her staff are excited to prepare your taxes for the 2023 tax season.

As a reminder, we are not carrying forward your bank information from last year. If you wish to receive your refund by direct deposit, please be prepared to provide us your routing and account numbers.

We are back to IN-PERSON APPOINTMENTS this year. If you experience any illness within 48 hours of your appointment date, we ask you to call and reschedule.

Please complete the *Client Information Form* before your in-person or drop-off appointment. You can find the form on our website at jtaxfs.com

DROP OFF SERVICE – You may drop off your documents (including the client information form) or send them electronically to:

Email: jtaxfs@gmail.com

Fax: 248-546-1735

We will notify you when we receive your documents.

If you have financial investments, please check with your financial advisor(s) that you have received all of your 1099 documents before scheduling an appointment.

If you are a homeowner, your city's online municipal directory may charge us to access the site. If you don't have your property tax documents and we have to look them up, a fee will be added to your tax preparation charges.

We appreciate you and have enjoyed serving you all these years. If you have any questions or concerns, please give us a call at 248-546-1735.

Sincerely,
Paula Roberts

Please see reverse side for you 2022 Tax Year Document Checklist

www.jtaxfs.com

Specializing in Personal, Small Business, Back and Out of State Taxes

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2022 Tax Document Checklist

- W-2 Forms
- 1099 SSA
- Records of Estimated Tax Payments Made to IRS and State
- 1095 A
- 1098 Forms
- 1099 R
- 1099 MISC
- 1099 NEC
- 1098 T
- 1098 E
- 5498 SA
- Schedule K1
- Income Records to Verify Amounts not Reported on 1099 MISC
- Records of All Expenses
- Business Use Assets
- Office in Home Information
- 1099 INT
- 1099 OID
- 1099 DIV
- 1099 B or 1099 S - Income from sale of stocks or other property
- Date of Acquisition and Records of Your Cost or Other Basis In Property You Sold (If Basis is Not Reported on 1099 B)
- 1099 SA
- 1099 LTC
- Health Savings Account and Long-Term Care Reimbursements
- Transactions Involving Cryptocurrency (Virtual Currency)
- 1099 K Payment Card and Third-Party Network Transaction
- W-2G Gambling Income
- Fees Paid to Daycare
- Vehicle Registration