

*****TAX REFORM HAS CHANGED MANY DEDUCTIONS*****

****PLEASE READ THIS FORM IN ITS ENTIRETY ****

Your 2021 appointment will be on _____ at _____ with Christine Vasquez for the preparation of your 2020 income tax return. Please also download the “Checklist” AND Client Organizer PDF’s as well as bringing any other important papers you wish to discuss with Christine. **IF YOU ARE NOT SELF-EMPLOYED, WORK EXPENSES ARE NO LONGER DEDUCTIBLE FOR FEDERAL PURPOSES. ANY WORKSHEETS NECESSARY FOR STATE DEDUCTIONS WILL BE PROVIDED UPON REQUEST.**

IF YOU CANNOT KEEP YOUR APPOINTMENT, TELEPHONE US AS SOON AS POSSIBLE SO WE CAN RESCHEDULE A NEW DATE & TIME. We will work with our clients as much as possible for any reschedules.

PLEASE CALL IF YOU ARE GOING TO BE MORE THAN 10 MINUTES LATE FOR YOUR APPOINTMENT. Because our clients schedule so far in advance, we want to limit any inconvenience to our other clients due to your tardiness. You can opt to drop off your documents to be completed at a later time, or possibly reschedule your appointment. Please remember that most appointments are scheduled for a ½ hour time slot.

If you have not received all your documents before the appointment, **DO NOT RESCHEDULE YOUR APPOINTMENT.** Please keep the appointment and bring what you have received. It will be easier and quicker to input the current information and complete the return later as a “Clean-Up” rather than rescheduling your appointment. Please remember many interest statements and mortgage statements are now available on-line.

If you are claiming any Education Credits, the student must have a 1098-T to claim those Credits. This form is located on the Student’s Blackboard or Portal, and must be printed out prior to the appointment. Per the IRS regulations, no 1099-T, no credit.

If you have a dependent that worked and needs a return completed, please contact us **PRIOR** to your appointment so we can fit it into the appointment. If we are unable to fit it in, it will be considered a “Drop-Off” and we will complete it with our other Drop-Offs and Mail-Ins. Those returns are completed after hours or on non-appointment days. It can take up to approximately **TWO TO THREE** weeks for completion.

The IRS and States will randomly mail **Audit Letters** requiring verification of certain information. Save your receipts and keep them with your tax packet. Any discrepancy on the tax return will cause a delay in processing your return and could trigger an audit, which could delay any expected refund. We have worksheets for some types of self-employment. If you are provided a worksheet, complete the form with your **actual** work expenses. **Due to strict rules by federal and state agencies, if you do not have the receipts don’t claim the deduction.**

WE ACCEPT DEBIT, CREDIT, CASH, CHECK, and MONEY ORDER. No return will be electronically filed until your fee is paid in full, other arrangements are made. A fee of \$25.00 will be charged for all checks returned for non-sufficient funds or for any reversal of debit/credit charges.

Elite Tax Services
150 South N Street
Tulare, CA 93274

Phone: (559) 685-5402 Fax: (559) 685-5406

Christine@elitetaxsvcs.com & Rachel@elitetaxsvcs.com