P.O. Box 2020 LaGrange, Illinois 60525 (708) 246-5665 Fax: (708) 246-5696 Tax@CRSmanagement.com

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Please gather your tax W-2 forms, 1099 interest, NEC, Misc., K, 1098 mortgage interest, Form 1095-A (Marketplace Insurance) and any other tax forms you have received and <u>review them for accuracy</u>. If there is a mistake, <u>promptly</u> contact the Issuer to make the correction.

If you have W-2 or 1099 forms to issue, you must send these out to your contractors or employees by January 31<sup>st</sup>. Forms 1099-MISC or NEC are issued for all services <u>paid to attorneys</u> and over \$600 if paid to others <u>excluding C & S corporations</u>. Worksheets for this information can be found on the CRS website, under "Accounting". You must collect the W-9 form info only once, unless notified of a change. Send a copy of the completed W-9 forms and an Excel worksheet with the amount paid to each (include form W-9 or name, address & SSN/EIN), to my office by 1/15/24.

**S Corporation & partnership returns, are due by March 15**<sup>th</sup>. I need your year-end figures soon, starting Feb 1<sup>st</sup>. Returns are prepared on a first-come, first-served basis. Those arriving late may have to go on extension, which ends September 15<sup>th</sup>. Filed S-Corp extensions save \$195+/month per partner, in late fees. PPP loan forgiveness is not taxable income but information about the loan is reportable. Please include with your documents.

Personal tax returns, C corporations & trusts are due by April 15<sup>th</sup>. Please send me your information starting Feb 10th. Your personal returns must be E-Filed, when possible, with a printed or PDF copy to you. You can also scan & email your information to me, in 3 PDF files (Income, Deductions, Other), and be sure to keep the originals in your file. If you bought or sold any real estate, please include a copy of the HUD-1 or Closing statement (2-3 pages-legal size), and other expenses paid. Unemployment income is taxable, but not workman's comp (such as for an injury).

Go to <a href="http://crsmanagement.com/Tax Forms.htm">http://crsmanagement.com/Tax Forms.htm</a> to find helpful tax forms. Ignore the year on the form, as it's only used as a worksheet. Please answer all the questions on the Tax Organizer form. Complete the rest of the form, only if you cannot send the original docs.

Copies of old tax return files in my files will be scanned then shredded, 5 years after they have been prepared (shredding 2017 & older). Reply by 1/31 if you want your old copies.

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- 1. Wage statements/W-2s
- 2. Self-employment business income and expenses/1099-MISC, NEC
- 3. Commissions received/paid
- 4. Pension, retirement income/1099-R
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- 16. Form 1095 & all medical & dental expenses (if over 10% of your gross income)
- 17. Real estate and personal property taxes
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- 20. Cash and non-cash charitable donations (receipts if over \$250)
- 21. Mortgage or home equity loan interest paid/1098
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