Ross and Ross

Accounting and Tax Service, P.A.

1629 Race Track Road, Suite 101 **www.rossandross.com** **4605 US Highway 17, Suite 3**
Saint Johns, FL 32259-6299 **Email: tax@rossandross.com** **Fleming Island, FL 32003-4829**
904-287-3737 (ext. 1) / fax 287-8757 **904-269-3737 (ext. 2) / fax 269-8757**

Enclosed is a worksheet to use as a guide in gathering your tax return information.

- **Please update phone numbers and email addresses as well as any information that has changed.**

- If you have any specific questions or concerns, please include them with your tax information.

- If you need an appointment, please call the office to schedule one. Telephone appointments are also available upon request.

- The most efficient way to get your taxes finished on time is to drop off, email, fax, or mail your information. We can also send you a link to upload documents to our secure portal. Copies and scans are fine. We do not need originals of anything. If we have questions, you will receive a call or email while we are working on your taxes.

- Drop in returns are worked on in the order they are received, so it is not necessary to wait until you have every document for us to get started. We have an extensive pending/hold system for missing items. Do not wait until the last minute to bring in your work. You should have basic items in early February.

- Office hours during tax season are Monday through Friday from 9am to 6pm. The office will be open on Saturdays beginning February 1st, from 10am to 2pm for drop off and pick up **only**.

- We accept cash, check, and all major credit cards for payment. Payment is due **BEFORE** we will transmit your tax return to the IRS - NO exceptions! We also offer the ability to have our fees deducted from your refund **for an additional fee of approximately $90.**

- If there is a special need for having your tax return completed early, such as for college financial aid applications or mortgage loans, please be sure to let us know in advance so we can better accommodate you.

****We need to have your tax information by March 4, 2025.****
****If we receive it after that date an extension may have to be filed.****

IF YOU NEED AN EXTENSION, YOU MUST CALL OR EMAIL TO REQUEST ONE! We cannot do this without direct contact from you. If necessary, we will automatically file an extension if your paperwork is already in our office.

If you have questions about any of this, please call or email.

We are looking forward to working with you this year.

Sincerely,
The Staff at Ross and Ross

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Please use this worksheet to gather your personal tax return information. If you were with us last year, we have the basic personal data below. Update anything that has changed. Include any notes or documents separately for our review.

Last Name: ____ Phone: (H) _________________ (W) ________________

First Name: (self) _____________________________________ SS#:_______________________ DOB______________

First Name: (spouse) __________________________________ SS#:_______________________ DOB______________

Cell numbers: (self) ________________________________ (spouse) ____

Address: ____

City, State, Zip: ____

Check here if you do not have an email address or would prefer for us to contact you by phone instead _________

Would you like the cost of your tax return deducted from your refund? **(additional fee approx. $90)** Yes No

Email address (primary contact for taxes):____

Email address (other contact person):____

Status (circle one): Married Single Newly divorced Married filing separate Legally blind Disabled Alien

Direct Deposit Info:
Please provide a voided check, or copy of a check, NOT a deposit slip.

If you had no bank changes, AND your bank had no changes, please confirm your bank name and last 4 #'s of the account.
Bank Name: ____Last 4 of acct #: ______________________________

Did you apply for or receive an IP PIN from IRS? Y N If yes, we must have that letter with the number.

Do you want to allocate money ($3) to the Presidential Election Campaign Fund? Self: Yes No Spouse: Yes No

DEPENDENTS

Name	Date of Birth	Social Security #	Relationship

Do your dependent children or other dependents have income from any source? Yes / No
If yes, have they filed their taxes? Yes / No Are we preparing their taxes? Yes / No

Child care expenses (bring the statements from the child care provider with tax ID numbers):

Child's name for which the expenses were paid ___________________________ ___________________________

Total paid to child care facility/individual $__________________________ $__________________________

Income From: ***(Bring all documents)***

[ ] W-2	[ ] Social Security	[ ] Partnership or S Corp (K1)
[ ] Interest	[ ] Rental property	[ ] Business or Farm
[ ] Dividend	[ ] Annuity rollover or transfer	[ ] Sales of Property/Land/Home
[ ] Sale of stocks, etc.	[ ] 1099-K – check online account	[ ] Gambling / Prizes / Tips / Other
[ ] 1099-R Pension Distribution	[ ] 1099-Misc/1099-NEC	[ ]
[ ] IRA distribution/rollover	[ ] Unemployment 1099G	[ ] Receive Alimony $____________
[ ] Roth IRA Conversion	[ ] 1099C or 1099A (cancelled debt)	Year you were divorced ___________

Did You: ***Bring all documents***

[ ] Adopt a child last year	[ ] Exercise any Stock Options	[ ] Set up a trust - type
[ ] Pay Alimony $__________		[ ] Purchase a home
Year you were divorced _______	[ ] Contribute to an IRA or SEP (Do you plan to?)	[ ] Pay estimated tax:
[ ] Pay Student Loan Interest		Date: ____________ $____________
[ ] Give gifts over $18,000 to any person in 2024	[ ] Contribute/Convert to a Roth IRA in 2024 (Do you plan to?)	____________ $____________
		____________ $____________
		____________ $____________

[ ] Have money or investments in foreign accounts or virtual currency accounts.

Did you have Marketplace health insurance? You MUST provide us the Form 1095-A. If you did not receive one by mail, you can print a copy by logging in to your marketplace account here: https://www.healthcare.gov/tax-form-1095

Un-reimbursed Medical Expenses: (only deductible if the total medical exceeds 7.5% of your income)

Prescriptions $______________________

Doctors/Hospital/Dentist/Co-Pay Amounts $______________________

Health/dental/cancer insurance-*not pre-tax payroll deducted* $______________________

Long term health care insurance premiums self $______________ spouse $______________

Medical mileage ____________________

Taxes Paid:

Real estate tax – main home	$______________	Sales Tax Paid on: home improvements, titled vehicles-cars, boats, ATVs, etc.	$_______________
Land/Vacation or 2nd home	$______________	Sales tax paid on **all** purchases (you added all your own sales tax)	$_______________

Interest Paid:

_ Home mortgage loan interest (bring Form 1098)

_ Home equity loan interest (bring form 1098) This is NOT deductible unless the money is used to improve, build, buy your main home. If funds are used to pay for other things or consolidate debt, it is NOT deductible.

_ Mortgage interest paid to an individual (provide name, address, SS# of that person)

Contributions to registered non-profit organizations (worksheet on our website)

Cash and checks - provide details $______________________

Clothes, furniture, etc. **(itemized separately if over $500)** $______________________

Charitable mileage – enter miles ______________________

There are specific rules for charitable deductions – you MUST provide proof to our office in order to take the deduction.

Teacher classroom supplies grades K-12. Grade you teach _____ $______________________

College related information ** You MUST provide form 1098-T and supporting docs to receive education credits**

Person it was paid for: ______________________________________

What year student were they during 2024? ______________________

Tuition & fees paid to institution in 2024: _______________________

Form 1098-T may need to be printed from the student's online portal, and should be located under the tax statement section.

Required classroom books, supplies, and equipment paid in 2024: _______________________________

If tuition was paid by a pre-paid college fund, provide Form 1099-Q, Payments from Qualified Education Programs.

If interest was paid on education loans, provide form 1098-E, Student Loan Interest Statement.

Please provide Payment History Report that shows proof of tuition costs and payments. This can be printed from the student's online portal, located under the Student Financial Account section.

Energy Credits:

Energy Credits are back with higher annual limits and NO lifetime maximum. If you replaced or installed solar equipment, A/C, windows, doors, insulation, water heater or other energy efficient property in your principal residence or a second home, include credit documentation, if applicable, and receipts. This does not apply to investment properties or new roofing.

Electric Vehicle Credits:

If you purchased a new clean vehicle, include **ALL** purchase documents and credit documentation. This includes electric vehicles.

If you purchased a Pre-Owned clean vehicle, include **ALL** purchase documents and credit documentation.
(Must be a 2022 year model or older, purchased for $25k or less, the first transfer of the vehicle, and be purchased from a dealer to qualify for the credit. You cannot have claimed another used clean vehicle credit in the 3 years prior to the purchase date of the vehicle.)

Virtual Currency:
Do you own, or did you purchase, sell, or use virtual currency on any level? Y___N___ If yes, provide statements.
This would be accounts using cryptocurrency such as Robinhood, Crypto, Coinbase, Blockchain, etc.

Form 1099-K:
Did you receive form 1099-K for any web-based transactions? Y___ N___ If yes, provide statements.
This would be accounts such as Cash App, Venmo, Paypal, Apple Pay, etc.

****You will need to check your online account for Tax Statements if you have any of the above mentioned accounts.****

Additional notes, information, questions, or comments: