Dear Client,

Thank you for choosing Asset Growth Associates Tax & Retirement Advisors for your 2020 personal Income Tax preparation services this year.

Please complete the information provided in the "**Bring to Your Appointment**" organizer and bring the documents with you when you either come for your appointment or drop off your tax return information.

Please remember to bring the following documents as well:

- Copy of your 2019 Income Tax return;
- Social Security Numbers and Dates of Birth for all Dependents;
- W2(s) from all Employers;
- 1099s from Banks, Pensions, Annuities and IRAs;
- 1099-Misc from all Contract Labor (as well as expenses, if any);
- Brokerage Account Statements;
- Mutual Fund Statements;
- Statements of Capital Gain/Loss Transactions with Purchase Price(s) and Sales Price(s);
- Records of Property Taxes Paid, Medical Expenses, Charitable Contributions,
- Mortgage Interest paid, and Sales Tax Paid on Large Items Purchased in 2020
- Copies of Quarterly Estimated Payment (if any);
- Other Information received which States "Important Tax Information"

For Business Returns, please provide the above required documents as well as the following;

- Copies of your Fiscal Year 2020 Profit & Loss Statement(s). (If you do not have financial statements, please provide your bank statements or spreadsheet(s) which indicate your income and expenses for the Fiscal Year
- Copies of your Fiscal Year 2020 Balance Sheet(s)

We will also electronically file your return if it is eligible. Please provide a **Voided Check** so we may verify your routing and account number(s).

Providing our tax preparers with all of your information will make your Income Tax preparation process as smoothly as possible, and will help avoid delays and/or extra fees in completing your return. If you have any questions, please do not hesitate to call us at (409)840-6900 or email us at info@savemyretirement.com.

Sincerely,

Asset Growth Associates Tax & Retirement Advisors