

Castellano Associates

Accounting and Tax Service

314 Washington Avenue, Belleville, NJ 07109

PHONE 973-751-8923 - FAX 973-751-3772

gerald@castellanoaccounting.com

amalia@castellanoaccounting.com

Dear Client,

****PLEASE NOTE** We have moved and our new address is as follows:**

**Castellano Associates
314 Washington Avenue
Belleville, NJ 07109**

This letter is designed to address policy and procedural changes at Castellano Associates and to help you gather the tax information needed to prepare your 2022 personal income tax return.

A client information sheet has been enclosed and must be filled out so we can ensure that our records are accurate.

Due to inflation, some fees will increase, especially if tax information is not complete and accurate and not provided in full at the time of preparation. An extra charge may be assessed for incomplete, inaccurate or late information. There will be NO DISCOUNTS when there is an unpaid balance. Payment of outstanding balances WILL BE required before new work is performed. **Acceptable forms of payment will be check or credit card. A 4% service fee will be applied when using your credit card.**

IN OFFICE APPOINTMENTS - Appointments will be scheduled on Tuesdays, Thursdays, and Saturdays between the hours of 10 am and 4 pm starting on Tuesday, January 24, 2023 (with few exceptions). Kindly fill out the client information sheet and bring it with you. Please contact Amalia by phone 973-751-8923 ext 2 or email amalia@castellanoaccounting.com.

MAIL IN POLICY - If you choose to mail in your tax documents, all the required forms and information listed on page two must be included, as well as, the client information sheet.

DROP OFF POLICY - If you choose to drop your tax documents at the office, all the required forms and information listed on page two, as well as, the client information sheet, must be left on the table in the vestibule. If you need to speak to someone at drop off, you MUST schedule an appointment.

If you are subject to identity theft, you must bring your IRS issued PIN letter.

SCAMS - IRS DOES NOT CALL TAXPAYERS. Call us for any guidance regarding IRS issues.

NO RETURN WILL BE FILED WITHOUT RECEIPT OF YOUR SIGNED 8879 FORM.

All client return copies will be mailed once complete.

NJ ANCHOR applications must be filed by January 31, 2023. Please call us if you need assistance.

On the day of your appointment, you **MUST BRING HARD COPIES** (information by phone or text **WILL NOT** be accepted) of the following information:

- Forms W-2 for wages, salaries, and tips
- Estimated tax payments - provide proof of payment
- All Forms 1099 for interest, dividends
- Retirement distributions - Form 1099R required
- Miscellaneous income
- Unemployment compensation - ONLY AVAILABLE ON NJ UNEMPLOYMENT WEBSITE
- Social Security Form 1099 must be supplied
- Gambling winnings - Form W2G's and win/loss statements
- Brokerage statements showing investment transactions for stocks, bonds, digital assets, etc.
- Schedule K-1 showing income from partnerships, S corporations, estates and trusts
- Statements and receipts supporting qualified education expenses, deductions or distributions, including any Forms 1098-T or 1099-Q
- Statements from the U.S. Department of Education for student loan interest
- Statements supporting deductions for mortgage interest (Forms 1098), taxes, and charitable contributions (including any Form 1098-C)
- Six-digit Identity Protection PIN for use during calendar year 2022, if sent to you by the IRS
- Any tax notices sent to you by the IRS or other taxing authority
- First time Veteran - Form DD214 required
- Daycare information - name of company, address, tax ID number, amount paid for 2022

DEPENDENT INFORMATION

- If a child was born during 2022 you must provide **name, date of birth, social security number**

HEALTH CARE INFORMATION

- All Forms 10-95-A, 1095-B, and/or 1095-C related to health care coverage or the Premium Tax Credit
- All forms 1099-QA and/or 5498-QA related to ABLE (Achieving a Better Life Experience) account**
- All Forms 1099-H related to Health Coverage Tax Credit (HCTC) advance payments

ALL BANK INFORMATION WITH A VOIDED CHECK FOR DIRECT DEPOSIT

- Other _____

Thank you,

Gerald Castellano, Senior Accountant
973-751-8923
gerald@castellanoaccounting.com

CLIENT INFORMATION SHEET

Taxpayer Name & Spouse (if applicable)

Address _____

Home Phone _____ Cell Phone _____

Email _____

Are you a Veteran YES or NO

Bank Name _____

Routing Number _____

Account Number _____

Checking or Savings _____

Credit Card Name _____

Credit Card Number _____

Exp Date _____ CVV _____