

Tax Do's and Don'ts

All the forms you need are on our website, MTAGLLC.com. Click on Services and then Tax Services.

Do watch the video.

Do listen to any messages we leave on your phone.

Do include a completed General Organizer and any other Organizer that you need,

- Trust/Estate Organizer
- Rental Property, or
- Business.

*If you want your refund or payment sent directly, please bring in a voided check. We will not be using previous ones you may have given us. *

Do bring in all official Tax forms you have received.

Do bring in Year End statements for all brokerage accounts, whether you are a financial client of MTAG or not. We do not allow the preparer to view our clients' accounts.

Please total up all the following: medical expenses: prescriptions, donations or home improvements or property tax.

Do provide us with Estimated Tax Payments made for 2022 tax year.

Do not give us receipts.

Do not include handwritten lists or your income.

Do not give us unopened envelopes.

Do not give us statements from your accounts, just the 1099R.

Do not include Social Security letters or 5498 FMVs.

Do not include handwritten lists.

Do not include home improvement receipts; but keep for your records.

Do not print out prescription lists, costs, receipts; totals are all we need.

Do not send us e-mail or text photos of documents. We will only accept PDF versions. You are more than welcome to mail or drop any documents off.

PTRs will not be completed until after tax season. Please bring it to your town for them to stamp the property tax verification form before giving it to us. There is an additional fee if you want us to fill it out.