

Additional information needed for your Tax Preparation

Did you live in NJ all of 2021? (or the year you are preparing taxes)

If no, where did you live?

When did you move to NJ?

Did you pay rent in 2021? (Or the year you are preparing taxes)

If yes, how much did you pay per month?

Was it for 12 months?

Did you own a property in 2021? (Or the year you are preparing taxes)

(If you collected rental income, we cannot do your taxes.)

For your property, we will need the following:

Mortgage Interest statement if you have a mortgage

Total Property Tax paid in 2021.

Block, Lot, or Qualifier number for the property.

Did you have medical expenses that you paid in 2021? (Or the year you are preparing taxes)

If yes, we need the following:

If you have insurance from your job that your part take, how much was taken from your check per paycheck? If you are not sure, you can provide the last paycheck for December 2021.

Total copay to all doctors visited in 2021

Total for all prescription paid in 2021

Did you buy eyeglass 2021? How much was the cost?

Did you make any cash donations to a charitable organization in 2021?

If so, How much? _____

Do you want direct deposit or debit of your refund or payment? If so, please provide your

Routine number:

Account number: