



January, 2022

Welcome back for another fun and exciting income tax season! You can stop checking your mailbox, enclosed is your 2021 Tax Organizer. If you're overwhelmed with the entire organizer (the year has been overwhelming), PLEASE at least go through the first few pages to update your personal information and complete the questionnaire. April 18th is the deadline this year and we don't anticipate that changing -thank goodness!

One great change at McDevitt & Duffy in 2021 was the addition of a new CPA, Becky Savell. Becky is finishing her master's degree in taxation, so she comes highly qualified for her new career. Most importantly, Becky is kind, her energy is contagious and she makes our office better.

We all look forward to serving you this year.

When you have a majority of your 2021 information together; scan/upload, email, mail or drop it off. We have a mail slot, so you can drop off information 24 hours a day. Although we will try our best, extensions may be prepared for people who do not have their information in **before March 20th**.

- Fill out and return your organizer **at a minimum**:
 - Review your personal information
 - Fill out the questionnaire
 - Sign and date the last page of the organizer questionnaire as acceptance of our engagement terms
- Bring in the following documents:
 - All W-2's, 1099-R's reporting pension/IRA income, SSA-1099's reporting social security income
 - All 1099's reporting dividends, interest, miscellaneous income, stock and real estate sales
 - All 1098's for mortgage interest and real estate taxes you paid
 - Any K-1's for income from partnerships, S corporations, estates or trusts
 - Any real estate HUD closing statement for sales, purchases or refinancing
 - **A copy of your 2021 tax return, if not prepared by this office**

Thank you for partnering with us for your financial and tax needs. For those of you that are new to our firm, welcome. Here's to another year of hard work and some fun along the way.

Best Regards,
Nancy, Kathy, Becky, Chris & Leah