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Dear New Homeowner,

***Congratulations on buying a new home!*** Owning your own home is a very rewarding experience but can pose some challenges regarding taxes. Our professional staff **can** assist you. Begin by compiling your income tax documents using the checklist enclosed with this letter as a guide. This list is not comprehensive so please include any document that you think will affect your tax situation. As a new client, we will need a copy of the prior year's return. As an added resource please view our website [www.newcentury-associates.com](http://www.newcentury-associates.com).

With all the challenges at the federal and state level, you need a professional more than ever. Your tax challenges are our passion! We want to be your helping hand. Our tax professionals can help you navigate the complexity of the tax laws.

For your peace of mind, all of our tax preparers are registered with the IRS and state as required by law. We encourage you to drop off your tax documents early to allow us ample time to complete your tax returns accurately. A 24-hour locked drop box is available at our building's front door for your convenience. Returns received after April 1<sup>st</sup> will not be guaranteed completion by April 15<sup>th</sup> and will automatically be extended. Both the primary taxpayer and their spouse or partner must provide us with a copy of either their driver's license or government issued ID. Returns can no longer be processed without this information.

**Contactless tax preparation is available.** Please contact our office to gain access to our secure portal. This will allow you to upload your tax documents and not have physical contact. Additionally, you can still use mail, email, fax or our locked drop box to keep contact to a minimum.

To assist with tax preparation, the IRS has setup a way for individuals to access your documents using IDme. We are suggesting you register for an account at IRS.gov and access information about you if you're having trouble obtaining the proper paperwork for your taxes. Not all information is available but will aid in the tax preparation for tax year 2023.

Our office is located at 2702 Back Acre Circle, Suite 220 in Mt. Airy. You may contact the Mt. Airy office at 301-829-7720. Feel free to schedule an appointment at a convenient time for you. We look forward to working with you.

Sincerely,

**Schedule your appointment TODAY!**

*Jenny Gulotta, EA*

Jenny Gulotta  
President

**PS: Bring this letter to receive a \$25 discount if you're a new client!**

IRS Disclaimer: "The IRS does not endorse any particular individual tax return preparer. For more information on tax return preparers, go to [www.IRS.gov](http://www.IRS.gov)"

## Tax Checklist for Individuals

Note: This list is not comprehensive Any changes to your income tax status should be noted.

Taxpayer: \_\_\_\_\_ SSN: \_\_\_\_\_  
 Spouse: \_\_\_\_\_ SSN: \_\_\_\_\_  
 Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
 Address: \_\_\_\_\_

Dependents (name)	SSN	DOB

Please check all that apply:

<b>Income:</b>	Alimony Rec'd (date of divorce)	Rental Income/Expense	Wages - W-2's
	Social Security Income (1099SSA)	Royalties - (1099 MISC)	Gambling (W-2G)
	Sale-securities/home/property	Dividends - (1099 DIV)	Tips/Gratuities
	State Income Tax Refund (1099G)	Foreclosure (1099A)	Commissions
	Unemployment Received (1099G)	Other Income (1099)	Online Sales (1099K)
	Cancellation of debt (1099C)	Pension/IRA Dist- (1099R)	Health Ins (1095A,B,C)
	Sharing/Gig Economy Income (Uber, Lyft, Air BnB, etc.)	Interest - (1099 INT, 1099 OID)	K1's (1065, 1120s, 1041)
	Capital Gains (1099)	Digital Assets - (1099B)	
		Contractors (1099-NEC)	
<b>Item Deductions</b>	Federal and State Estimates	Medical /Dental Expenses	Cash Contributions (Receipts)
	State/Local Tax	Long Term Care Insurance	Non-cash contributions (Receipts)
	Real Estate Tax	Prescriptions	Vehicle Donations (motor vehicle 1098C)
	Home Mortgage Interest (1st & 2nd)	Hospital Expense	
	Refinance home-closing statement	Health Insurance premiums	
	Purchase home-closing statement	Prescriptions	
	Sales Tax (Receipts)	Other Medical Expenses	
<b>Other Deduct. /Credits</b>	Moving Expenses (military only)	Estimated Payments - copies of canceled checks	Copies of Social Security Cards
	Tuition	Alimony Pd (date of divorce)	Copies of Driver's License
	Education Expenses	Child Care	EV Purchase
	Health Savings Accounts	Self Employed Health Insurance	Residential Home Improvements
	Sep/Ira Contributions		
	Student Loan Interest		
<b>Profit/Loss from Business</b>	Advertising	Legal & Professional	Repairs & Maintenance
	Car/Truck Expenses	Mileage	Payroll
	Commissions & Fees	Office Expense	Taxes and Licenses
	Employee Benefits	Payroll	Telephone
	Health Insurance	Pension/Profit Sharing	Travel & Meals
	Interest	Postage	Utilities
	Internet Service	Receipts/Sales	Wages Paid
	Insurance	Rent or Lease	Other Expenses