

Dos and Don'ts Tips to Preparing Your Taxes

Please note: Documents will NOT be returned at the end of the season. Kindly email or upload all tax documents to the portal.

- ☑ Do submit **all** information needed to complete your tax return by [SecureFile Pro portal](#), email, mail-in, fax, or drop-off at the same time. Omission of pertinent information may cause delays in processing or an incomplete tax filing. It may also result in refund delay and/or IRS or state audit. Please see our website at www.EdONeillTaxes.com for a checklist of required documents and sample documents.
- ☑ Do provide a valid, current, clear and legible copy of [State Issued Identification](#) (such as a state issued driver's license-both *front and back*) for Taxpayer and Spouse (if applicable). Driver's license is **required every year**. A copy of the NYS Driver's license requirement policy may be obtained from our website.
- **Don't** fax your state issued identification as the poor quality makes it illegible to process.
- **Don't** send originals; Keep them for your records. Clear photocopies are acceptable.

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- ☑ Do submit Form [1098T](#), tuition bills or a transcript from the Bursar's Office to qualify for the **college tuition credit**.
- ☑ Do submit a voided check, **required each year**, in order for you to receive a refund directly deposited in a specified account.
- ☑ Do complete the pertinent documents in the [newsletter](#) and submit them with all your tax documents. We must receive the [Signed Letter of Engagement](#) and [Completed Client Information form](#) and all tax documents in order for us to prepare your tax return.
- ☑ Do advise us of any change of address, any change in marital status (Single, Newlywed, Separation, Widow or Divorce), any change of dependents (New Baby or a Child claiming themselves). If you had a baby in 2024, Congratulations! Please submit the child's name, social security number and date of birth.
- **Don't** cut documents. This will only delay the process.
- **Don't** staple documents. This will only delay the process.
- **Don't** submit receipts. Keep all receipts for your records.
- ☑ Do submit a grand total of your expenses.
- ☑ Do feel free to provide clear and legible *copies*. Originals will not be returned.
- ☑ Do clear your voicemail box so that we may leave a message, if necessary.
- ☑ Do leave your phone number when leaving a message.
- ☑ Do scan to one .PDF, if possible, when submitting documents via email or portal.

We appreciate your cooperation and assistance. Thank you.

Many happy returns,

Ed

Ed O'Neill Ltd.

