

Dos and Don'ts Tips to Preparing Your Taxes

Please note: Documents will NOT be returned at the end of the season.

Kindly upload all tax documents to one .pdf to the portal or email them to Office@EdONeillTaxes.info.

- ☑ Do submit **all** information needed to complete your tax return by [SecureFilePro portal](#), e-mail, 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 is attached to this newsletter.



- **Do NOT** fax your state issued identification as the poor quality makes it illegible to process.

- **Do NOT** 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**, for you to receive a refund directly deposited in a specified account.
- ☑ Do complete and sign all pertinent documents in this 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, including a clear copy of the front and back of all taxpayer's driver's licenses and voided check in order for us to prepare your tax return or visit our website at www.edoneilltaxes.com to download the required documents.
- ☑ 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 2025, Congratulations! Please submit the child's name, social security number and date of birth.



- **Do NOT** cut documents. This will only delay the process.



- **Do NOT** staple documents. This will only delay the process.



- **Do NOT** submit receipts. Keep all receipts for your records. Submit only totals.

- **Do NOT** sign and submit documents from your smart phone. We will not be able to open the documents.

- ☑ 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 clearly state your name and phone number when leaving a message.

- ☑ Do scan to one .PDF, if possible, when uploading documents to the portal or emailing.

- ☑ Do feel free to visit our website www.edoneilltaxes.com. It provides a wealth of information. Thank you.

We appreciate your cooperation and assistance. Thank you.

Many happy returns,

Ed

Ed O'Neill Ltd.

1400 Old Country Road, Suite 316, Westbury, NY 11590

www.EdONeillTaxes.com



Office@EdONeillTaxes.info



516.935.7771

516.822.6704