



Welcome to 2023, I look forward to hearing from all of you soon. – Pete

APPOINTMENT SCHEDULING

- Make your appointments through my website at pngaccounting.com, or call or email to set up a time.
- **In Person Interviews:** Bring your documents to my office.
 - **Virtual Meetings:** are recommended. I will be conducting interviews using ZOOM.
 - **Telephone Meetings:** If you're not tech savvy and don't want to use ZOOM, we can do a phone call.
 - **No Meetings:** Send me your documents and we can complete the process through e-mail or over the phone.

GETTING YOUR DOCUMENTS TO ME

- **Electronically:** Use the feature on my website to upload your documents securely.
 - Email a request for your username and temporary password.
 - Or you can use the guest portal.
- You can still send thru email, snail mail, or drop off at my office between 9-5 M-F
- **DO NOT TEXT PICTURES TO MY CELL PHONE.**

CHILD TAX CREDIT

Unfortunately, the expanded child tax credit was not renewed by Congress. Therefore, The credit is now back to \$2,000 per child instead of the \$3,000 for 2021. This means if you claim your children as dependents expect a smaller refund this year.

HYBRID / ELECTRIC VEHICLE CREDITS:

The eligible vehicles to claim this credit were changed in the middle of the year. If you purchased a new or used hybrid or electric vehicle bring the sales contract with you to determine if you qualify for the credit.

HEALTH CARE INSURANCE

- If you had health care you should receive a Form 1095. Please submit with your tax documents.
- If you did not have health care, California still has a penalty.

VIRTUAL CURRENCIES REPORTING REQUIRED

I will need any information if you sold or spent any virtual currency such as BitCoin

IMPORTANT DATES

- Feb 1:** W-2's and 1099's must be issued and filed
- Mar 15:** S-Corporation, Partnership, LLC Tax Deadline
- Apr 18:** Individual Tax Deadline and C-Corporation Tax Deadline

TAX ORGANIZER

A tax organizer provides with your information from last year's tax return which you can use to assist you in putting together this year's information. If you would like to receive your personalized tax organizer please let me know.

PAYMENTS

I accept cash, check, PayPal, Zelle and all major credit/debit cards. New policy: I will not e-file any returns until payment for my services has been received.

REFERRALS

Refer a friend or family member for my services and receive a \$25 gift card or a \$25 discount.

CONTACTING ME

The fastest ways to receive a response is to contact me by:

1. Email
2. Call my office
3. Text
4. Call my cell phone



An Enrolled Agent is the most comprehensive tax license issued by the IRS.

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By nature of a newsletter, this information is in summary form and does not necessarily detail every requirement, restriction, eligibility, or tax planning strategy. If you are considering any tax planning strategy or have any questions regarding the information in this newsletter please contact me for further details. Any tax advice in this newsletter cannot be used by any party to avoid penalties which may be imposed by the Internal Revenue Service.



If you are a new client to P&G Accounting please bring your last year's tax return with you.

Returning clients may call me to receive your individual tax organizer with last year's numbers on it to aid you in remembering what you need.

This list contains some of the most common items you will encounter on your return, however it is not a complete list of everything you may need. If you have any questions please call me at 909-912-0183.

PLEASE BRING THIS CHECKLIST AND YOUR LAST PAYCHECK STUB WITH YOU TO OUR APPOINTMENT

EVENT	DOCUMENTS OR INFORMATION NEEDED	✓
New Clients	Previous 2 years return	
Birth or Adoption	Social Security Cards and Adoption Papers	
Divorced or Separated	Divorced: Date Finalized and Copy of Divorce Decree Amount of Alimony Paid or Received; Separated: Copy of Separate Maintenance Agreement	
Health Insurance Coverage	Form 1095 (New Form)	
Additional Members of Household	Dates of Occupancy and Relationship	
Work	W-2 and Last Paycheck Stub	
Job Change	W-2 from both new and previous employers	
Received Interest Income	Form 1099-INT	
Own a Foreign Bank Account	Statements and amounts related to the account	
Unemployment	Form 1099-G	
PPP / SBA Loans	Loan amount, terms	
Retirement Contribution	Type of plan and amount contributed	
Retirement Distributions	Form 1099-R	
Social Security Benefits	Form 1099-SSA	
Sales of Stocks, Bonds, etc.	Form 1099-B + Original Purchase Date and Original Cost	
Bitcoin / Virutal Currencies	1099 if received Date Purchased and Cost Date Sold and Proceeds.	
Hybrid / Electric Vehicle	Purchase Contract	
Purchase or Sale of Home	Escrow Closing Papers (Hud 1 Statement)	
Paid Mortgage Interest	Form 1098	
Refinanced a Home	Escrow Closing Papers and Form 1098	
Inheritance	Will, K-1 from estate	
Lawsuit Settlement	Form 1099-Misc and reason for settlement, attorney fees	
Rental Property	Rental Income and expenses Date and cost of any new equipment purchased	

EVENT	DOCUMENTS OR INFORMATION NEEDED	✓
Renters Credit	Address where you rented and dates lived there	
Cancellation of Debt	Form 1099-A or 1099-C Date property was taken by bank or sold in foreclosure	
Estimated Tax Payments	Dates and amounts paid	
Self-Employed	Profit and Loss Statement Business Miles Home office expenses	
Received Prizes	Form 1099-Misc	
Lottery or Gambling Winnings	Form W-2G and amounts won if not reported on W-2G Total amount of losses	
Medical Expenses	Health Insurance Premiums and total of doctor/dental visits, prescription drugs, and any other medical costs	
Medical Miles	Total miles driven for medical purposes	
State Income Taxes property taxes paid DMV License fees Sales Tax on Vehicles	W-2 and prior year tax return Property tax bills, Form 1098 Copy of registration or amounts paid Purchase Contract	
Charitable Contributions Cash, Less than \$250	Cancelled check, bank record, or written receipt from charity	
Cash contribution over \$250 Non-Cash, less than \$500 Non-Cash, over \$500	Written receipt from charity Written receipt from charity or other reliable record Written receipt, name and address of charity, date donated, type of property donated, date acquired, fair market value	
Non-Cash over \$5,000	Same as above plus a qualified appraisal	
Job Related Expenses Job Seeking Expenses	Meals, lodging, and other amounts related to your job Expenses related to seeking work, even if no work was found	
Education or Student Loan Interest and Expenses	Form 1098-T, other related expenses such as books, fees, computers, etc.	
Child or Dependent Care	Name, address, phone, and Tax ID number of provider Amount paid to the provider	
Any Received Correspondence from the IRS or State of CA	Copies of any notices, letters, tax bills, etc.	

Please visit my website at www.pngaccounting.com for more information and tools, such as downloadable forms to help you prepare your 2021 tax paperwork for our appointment.

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