



Tax Preparation Hints: How to Submit Your Documents

Often, *how* you send in your tax documents is just as important as *when*. We try to process your returns as soon we receive them, but there are some things you can do on your end that will help expedite things on ours.

- ✓ Complete the pre-season [checklist](#).
- ✓ Submit all documents at the same time (we are not octopus!)
- ✓ Write down any question, concerns, or cries of anguish and submit with your paperwork so we can answer the questions with your complete file in front of us.
- ✓ Remove all staples (do your part to prevent broken fingernails everywhere).
- ✓ Open all envelopes and unfold the documents (apathy is not efficient!).
- ✓ Stack paperwork neatly so we can quickly see what you have provided and what could be missing.
- ✓ Do not write on sticky notes, use a piece of paper (sticky notes become unsticky, then unstuck, and then become just random pieces of recyclable trash).
- ✓ Add up all medical receipts: one total for the couple and children (unless the children are over 18) then add up for each child separately.
- ✓ Add up all charitable donation receipts.
- ✓ Add up all daycare receipts.
- ✓ Separate your paperwork by taxation year and then by each member of your household.
- ✓ Put *all* of your paperwork in an envelope for drop off. Do not drop off loose paper! (see 'sticky note' comment)
- ✓ Please don't send in your paperwork in multiple ways (e.g. fax one day, then email the next, then drop off the following Tuesday). One method, one time will suffice.

Not long ago, everyone submitted their taxes by dropping them off. Back then, you made sure your paperwork was complete or suffer the inconvenience of making a return trip. These days, email has made submitting tax documents so convenient, that some people believe that it's somehow more efficient to email their documents as they come in. It's not. Not only does that make it almost impossible to keep track of the variety of documents we receive, but we end up changing and reprinting tax returns multiple times as new information comes to light. That ... bogs ... us ... down ...!

The most efficient way to submit your taxes to us is to compile **all** of your documents, organize them, put them in one envelope (or one email) and submit it one time to our office. That's it. Easy-peasy. Ok, ready? Go!