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INDIVIDUAL (1040) SERVICES

1. We provide a detailed list of items for your review to assist in gathering the necessary information for your tax preparation appointment.
2. We review your tax return from the previous year to ensure that we report all information on your return.
3. The tax appointment is scheduled with Howard and the meeting takes about one hour.
4. Appointments are scheduled on Tuesday, Thursday and Saturday from 8:00am to 7:00pm. If you live out of area, we can set up a phone appointment as well.
5. The appointments are more than acquiring tax information, we encourage your questions and endeavor to educate on a variety of topics - such as:
 - Estate and Trust Planning
 - Mortgage rates
 - College Saving Programs
 - Future tax planning
 - Discuss financial planning, life insurance, and related legal issues
 - Other deductions you may be entitled to
 - Address questions you may have
6. Our office is set up to prepare all 50 States, as well as multi-state returns.
7. We handle international tax matters (access to accountants all over the world).
8. We handle all types of sophisticated investments from a tax standpoint.
9. We prepare a paper or electronic copy of your completed return for your records.
10. We are available throughout the year for questions, notices you may receive, and future tax planning issues.