

## WHAT TO SEND - CHECKLIST:

**IRS / State Returns** - Last year's copies

**Phone & Email** - Must provide both

**Mailing Address** - If different than W2

**DOB / SSN** - You, spouse, dependents

**Voided Check** - Direct deposit of refund

**Drivers License** - Copy of yours & spouse

**Last Paycheck** - December 14th

**Official Forms** - W2, 1099 K, NEC, MISC

**Unemployment** - Form 1099 G

**State Refund** - Received - Form 1099 G

**Interest** - Earned in banks - 1099 INT

**Dividends** - Stocks you own - 1099 DIV

**Pensions** - 401k withdrawals - 1099 R

**Stock Sales** - Brokerage account - 1099 B

**Social Security** - Benefits - SSA-1099

**Education** - Tuition paid - 1099 T

**Student Loans** - Interest paid - 1098 E

**Day Care** - Qualified EIN letter or SSN

**NJ Residents** - Use medical link - website

**Rent Paid?** - CA, IN, MA, MI, MN, NJ, WI

### Possible Itemized Deductions

**Homeowners** - Form 1098 - taxes paid

**Charity By Checks** - Or payroll deducts

**Charity By Goods** - + \$500 send receipt

**Tax Prep Fee** - Paid to do them last year

**Car Registration Fee** - Certain states only

**High Medical** - See Medical link - website

[www.taxattendant.com](http://www.taxattendant.com)

## HOW TO SEND YOUR INFO:

### NEW OFFICE ADDRESS

#### MAIL

**Tax Attendant, LLC**  
**222 Woodland Ave**  
**Avon by the Sea, NJ 07717**

#### EMAIL

**Taxattendant@me.com**

#### PHONE / TEXT

**908-500-0105**

#### WEBSITE

**www.taxattendant.com**

#### HOURS

**10 am - 6 pm**

**10 pm - 12 pm**

**Mon - Sat**

**East Coast Time**

### After Your Taxes Are Completed

- \* Returns sent by Priority Mail w/tracking.
- \* Review them for accuracy & omissions.
- \* Sign enclosed E-file permission slip.
- \* Return signed forms w/your payment.
- \* Use self addressed stamped envelope.
- \* Upon receipt, I will e-file your returns.
- \* Direct deposit of refund is 14-21 days.

### Payment Options Available

- \* Check payable to "Tax Attendant"
- \* Cash App. - Venmo - Zelle
- \* Cover letter will list all these options
- \* Only sign/pay when taxes are done
- \* IRS requires completed taxes in hand

**908-500-0105**

## TAX ATTENDANT, LLC

### FLIGHT ATTENDANTS' TAXMAN

**A Flight Attendant since 1992**  
**Who knows our industry**

### IRS & STATE LICENSED - E-FILE

**Send your information by**  
**Mail - Email - Text**

### FAST - PRIORITY MAIL SERVICE

**Your taxes done in 1 - 3 days**  
**Direct Deposit in 14 - 21 days**

### \$\$\$ DISCOUNTS \$\$\$

**New Hires - Free Sch C - Save \$40**  
**Military/First Responders - Save \$25**  
**Each Referral Earns \$20**

### PER DIEM & FA EXPENSES

**States still allow deductions**  
**AL AR CA HI MN NY PA**

### AFFORDABLE INDUSTRY RATES

**IRS Only \$135    IRS & State \$150**  
**Itemized \$25    P/D Expense \$25**

### JAY KLEIN - EWRSW

**Licensed IRS EFIN**  
**Licensed IRS PTIN**  
**Licensed Federal FEIN**  
**Licensed State of NJ CORP**



**Helping Others Since 1993**

**Residents of these States only - AL - AR - CA - HI - MN - NY - PA****Fill this Page out to Itemize Your State Return****AFA LOCAL****UNION** Dues \_\_\_\_\_ On Leave Dues \_\_\_\_\_ Initiation Fee \_\_\_\_\_ Event / Mtg Miles \_\_\_\_\_ Volunteer Miles \_\_\_\_\_ Cell \_\_\_\_\_**DOCUMENTS & TRAINING****DOCUMENTS** Passport \_\_\_\_\_ Visa \_\_\_\_\_ Photo \_\_\_\_\_ Miles \_\_\_\_\_ Prkg \_\_\_\_\_ Tolls \_\_\_\_\_ Lost ID \_\_\_\_\_ Global Entry \_\_\_\_\_**TRAINING** R/T Drive To Airport Miles \_\_\_\_\_ # Of Days \_\_\_\_\_ Tolls/Prkg \_\_\_\_\_ Hotel \_\_\_\_\_ Dry Clean \_\_\_\_\_ Lost Manual \_\_\_\_\_**LANGUAGE** Computer Software \_\_\_\_\_ Text Books \_\_\_\_\_ Reading Books \_\_\_\_\_ CD DVD Tapes \_\_\_\_\_ Classroom Fees \_\_\_\_\_**UNIFORM & MAINTENANCE****UNIFORM** Purchase \_\_\_\_\_ Dry Clean \_\_\_\_\_ Home Laundry \_\_\_\_\_ Coin Laundry \_\_\_\_\_ Alterations \_\_\_\_\_ Wings \_\_\_\_\_**SHOES** Uniform Store Purchase \_\_\_\_\_ Shoe Shines \_\_\_\_\_ Repairs \_\_\_\_\_ Taps \_\_\_\_\_ Inserts \_\_\_\_\_ Orthopedics \_\_\_\_\_**LUGGAGE** Roller board \_\_\_\_\_ Tote \_\_\_\_\_ Lunch Bag \_\_\_\_\_ Shoe Bag \_\_\_\_\_ Repairs \_\_\_\_\_ Wheels \_\_\_\_\_ Tags \_\_\_\_\_**COMPANY COMMUNICATIONS****CELL PHONE** Monthly Bill \_\_\_\_\_ Reserve? \_\_\_\_\_ Line Holder? \_\_\_\_\_ A/B? \_\_\_\_\_ Calling Cards \_\_\_\_\_ Phone App. \_\_\_\_\_**COMPUTER** Home Access \_\_\_\_\_ Layover Access \_\_\_\_\_ Paper/Ink \_\_\_\_\_ Bid Plus \_\_\_\_\_ Bid Service \_\_\_\_\_ Skype \_\_\_\_\_**SMALL TOOLS & SUPPLIES****SMALL TOOLS** Log Book \_\_\_\_\_ Flashlight \_\_\_\_\_ Galley Gloves \_\_\_\_\_ Dual Zone Watch \_\_\_\_\_ Repairs \_\_\_\_\_ Charger \_\_\_\_\_**SUPPLIES** Hair Accessories \_\_\_\_\_ Batteries \_\_\_\_\_ Postage \_\_\_\_\_ Copy \_\_\_\_\_ Fax \_\_\_\_\_ Business Cards \_\_\_\_\_ Link \_\_\_\_\_**PORTABLES** Alarm \_\_\_\_\_ Converter \_\_\_\_\_ Curler \_\_\_\_\_ Dryer \_\_\_\_\_ Flat Iron \_\_\_\_\_ Shaver \_\_\_\_\_ Electric Toothbrush \_\_\_\_\_**TRAVEL & BANK FEES****TRAVEL** Van Tips \_\_\_\_\_ Short Call Cabs \_\_\_\_\_ Airport Parking \_\_\_\_\_ Lost Parking Pass \_\_\_\_\_ Co. Meeting Miles \_\_\_\_\_**BANK FEES** Layover ATM Withdraw \_\_\_\_\_ Check Cash \_\_\_\_\_ International Bank Charges \_\_\_\_\_ Currency Exchange \_\_\_\_\_**CO-TERMINAL** Home Base \_\_\_\_\_ Co-Base \_\_\_\_\_ # Of Miles - From Home Base To Co-Base \_\_\_\_\_ # Of Trips \_\_\_\_\_ Tolls \_\_\_\_\_**PER DIEM****SUB UA & CO** Provide "Per Diem Report" - Found Online Only - Flying Together - My Info - Per Diem Letter - Print & Send**AFFORDABLE INDUSTRY RATES****Paid Only When Takes Are Done****Priority Mail w/Tracking****IRS With State \$150****IRS No State \$135****Married Joint \$15****Itemized Deductions****IRS Schedule A \$25****State Per Diem FA Expenses \$25****Second State Return \$40****Complete List of Rates****See My Website****[www.taxattendant.com](http://www.taxattendant.com)****New Hire Discount****Free Schedule C - Save \$40****Write Off Training / Meal Expenses****Can Increase Your Refund Too****Referral Program****Each Referral Earns \$20****Hundreds Paid Out Last Year!****Thank You For Your Trust****File Early****After March 31 All Returns Add \$25**