BURR BUSINESS SERVICE

BARMAR, INC.

Bookkeeping & Income Tax Service

1655 South 25th Street Lincoln, NE 68502

(402) 477-3822 - Fax 1-866-344-3032

PREPARING FOR YOUR TAX INTERVIEW

WHAT TO BRING?

* All copies of your W-2's.
* All 1099's and 1098's from banks, credit unions and brokerage companies.
* All K-1's from investments in any business.
* All closing statements if you have bought sold or refinanced a home or property this year.
* A summary total of charitable contributions: cash and non-cash.
* Amount of taxes paid on real estate, personal property, cars and boats.
* A summary of any job related expense.
* A summary of medical expense.
* IRA and pension year-end statements.
* Unemployment statement.
* Alimony paid or received.
* Proof of estimates paid both federal and state.
* Information on educational expense.
* Student loan interest paid.
* Childcare information
* New dependent name, social security number and birth date
* A copy of last year's tax returns (New Clients only).

HOW LONG DOES THE INTERVIEW TAKE?

* If you bring the items listed above and are well organized, your interview will take no more than 30 minutes.
* During the interview we will ask you questions while obtaining this years data. The purpose of our questions are to: obtain all of this year's required information, obtain additional deductions that you may have overlooked, give you some tax planning ideas for next year, and answer any questions that you may have. We may not be able to assemble all of the information during the interview, and we may ask you to call us to clarify or provide additional information, or to provide copies of needed information, or to provide us with permission to contact other parties who can provide information regarding your tax return such as brokers or bankers.
* If you bring in pieces of paper and try to summarize your expenses while we do the interview, your interview will take longer than 30 minutes and you will be charged for this extra time.

TIPS FOR YOUR INTERVIEW:

* Come prepared and well organized with your information summarized.
* Call us and ask for a tax organizer.
* Arrive 5 minutes early for your appointment.
* Refer friends and associates to us for tax advice.
* Plan to be treated professionally, courteously and promptly.
* Current clients may skip the interview process by dropping off or mailing in your tax information and having us call you to do the interview by phone.
* Ask us questions about retirement, college savings, and estate planning or investment activities.