



*You hold the power to control your financial future.
Let's get there together.*

Financial & Tax Strategies for Today's Retiree

We thank you for choosing Merlak Tax Advisory Group, Inc. for your tax preparation services this year. So that we are completely equipped to prepare your return, please bring any of the following items that you might have:

- Previous 2 years returns (New Clients)
- Social Security Numbers of all dependents
- Dates of Birth
- W-2's
- 1099-R – Pension & Retirement
- 1099-Misc – Miscellaneous Income
- 1099-NEC
- 1099-K
- Any other 1099's or income documents
- End of Year Brokerage Statement (Cost Basis)
Consolidated 1099, 1099 B, 1099 DIV, 1099 INT
- IRA Contributions
- Direct Deposit Info
- Alimony paid or received (requires divorce date of separation agreement)
- Mortgage Statements
- Property Tax Info and PIN
- Medical Expenses
- Charitable Contributions
- Dependent Care Information
- Business Records
- Social Security Statements
- Rental Property Records (income & totaled expenses)
- Education Expenses (1098-T)
- Property tax records
- Estimated payments made to IRS or State
- Educator Expenses & PEL Number (teachers)
- Sales Tax on Large Purchases
- HUD (for sale or refi or purchase of your home)
- K-12 Registration Fees and Supply Costs

IMPORTANT:

Please be sure to have ALL information needed to complete your return.

Your tax preparation is a 2-appointment process and payment ***of the \$89 fee (for personal federal and IL state tax return preparation) is to be paid on the first appointment in the form of CASH, PERSONAL CHECK, ZELLE, CREDIT or DEBIT CARD!***

Elmhurst: We are located two blocks east of Rout 83 on North Avenue on the north side of the street, directly across from the Delta Sonic Carwash and Just Tires. You will turn in on the 2nd street, Shady Lane to enter the parking lot. It is a 3 story cream color office building (the building on stilts – parking underneath). If you get to West Ave., you have gone too far east.

Lake in the Hills: We are located in front of the Lake in the Hills airport. Coming from Algonquin Rd. and Pyott Rd. use the left turn lane at the sign “to Lake in the Hills airport”. From Jameson Rakow Rd. and Pyott Rd., go to the second right turn lane. You will proceed to a stop sign where you will turn right. The building is on the left, The Windsock Executive Center, (gray building, wrap around porch, green roof and orange windsock).



Merlak Tax Advisory Group, Inc.

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