

IMPORTANT: Please be sure to have ALL information needed to complete your return. If you know you are missing documents, please call to reschedule.

Your tax preparation is a 2 appointment process and payment ***of the $69 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 OR CREDIT/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 Road on Pyott use the left turn lane at the sign “to Lake in the Hills airport”. From Rakow Road on Pyott, 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, (brown building, wrap around porch, green roof and orange windsock).

* 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
* Education Expenses
* 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
* Any other 1099’s or income documents
* End of Year Brokerage Statement (Cost Basis)
* IRA Contributions
* Voided Check (for electronic filing, direct

deposit, and faster processing of return)

* Sales Tax on Large Purchases

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:

You hold the power to control your financial future.

Let’s get there together.

**Financial & Tax Strategies for Today’s Retiree**

**Merlak Tax Advisory Group, Inc.**

**8411 Pyott Rd. Suite 107 Lake In The Hills, IL 60156**

**579 W. North Ave. Suite 205 Elmhurst, IL 60126**

**779.220.9608** [**www.merlatax.biz**](http://www.merlatax.biz)

Investment advisory services offered through Brookstone Capital Management, LLC (BCM), a registered investment advisor. BCM and Carla J. Merlak are independent of each other.