

JAMIE R DENT CPA LLC  
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January 17, 2022

Dear Client,

Happy New Year! As the year begins, and tax reporting forms begin to arrive, we want to remind you which ones we need you to accumulate to send to us with your tax information. In order to accurately prepare your return, please complete the enclosed green [Returning Client Tax Worksheet], and return with your documents by our new secure portal (call the office if you need access), fax, postal mail, in person, or by drop box for after-hours delivery (mail slot located on front door). Since we are talking about your tax dollars, please be as detailed as possible.

We take your privacy seriously and have gone to great lengths to keep your information confidential. Due to the increased threats of a breach, we have implemented a higher level of privacy standards to keep your personal information secure, and upgraded our software and hardware for your protection. We have also implemented a portal system to add more protection in the electronic transfer of personal information. Due to regulatory requirements, we will no longer e-mail private information (tax returns, personal, or financial statements). We will use a secure portal instead. The new portal will be the only vehicle in which we will share private information electronically.

Due to rising costs of general overhead, technical upgrades, and time spent with regulatory requirements, there will be a fee increase of between 10-25%, depending on the size and complexity of the return. Once tax documents are received by our office, an engagement will be sent via email, for price transparency, and privacy policies. Payments for services are due when the tax return is completed.

**March 25, 2022** – We must have all your tax information by this date in order to complete your return by the tax deadline of April 18, 2022, otherwise it will be necessary to file an extension. Payment of the proper estimate of your tax liability should be made with the extension by April 18, 2022 in order to alleviate any charges from the IRS for interest and penalties. Filing an extension is easy and it ensures that we have enough time to review and complete your tax return if you're unable to get us the information we need before our deadline of **March 25, 2022**.

As a reminder, here is a simple checklist in gathering your tax documents. Please check for those applicable to your situation:

- Green Returning Client Information Form (enclosed)** We must have in order to process return!
- New: IRS Notice 1444-C for the 2021 stimulus check, and
- New: IRS 6419 for those folks that received the advance child credit
- W-2 for wages
- W-2G for gambling
- 1099-Int for Interest
- 1099-DIV for Dividends
- 1099-B Brokerage Statements for stocks, bonds, etc
- SSA-1099 Social Security Statements
- 1099-NEC for income
- 1099-Misc for income
- 1099-K for income

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- 1099-R for retirement
- 1099-G for refunds & unemployment
- 1099-SA for HSA's (Health Savings Account)
- 1098-Int for Mortgages
- 1098-T for Tuition
- 1098-E Educational Expenses (including student loan interest expense)
- K-1 forms from investments in S corporations or partnerships
- Form 5498 for IRA values
- IRA and Roth IRA contributions for 2021
- Child care costs, name, address, amount, and ID# of the recipient
- Charitable donations- total amounts and recipients
- Property tax paid on your home, property or cars
- Mileage log(s) for business, moving, medical and charitable driving
- Medical, dental, and vision expenses
- Business expenses
- Records of any asset purchase and sales
- Records of any out of state purchases that may require use tax
- Health insurance records (including Medicare and Medicaid)
- Home sales (or refinance) records
- Casualty and theft loss documentation (federally declared disasters only)
- Moving expenses (military only)
- Legal papers for adoption, divorce, or separation involving custody of your dependent children
- Estimated tax payments and dates
- Any letters you received from the IRS or state tax authorities
- A copy of your income tax return from last year, if not prepared by this office

If you have a small business or rental property(s), we can provide you with a separate checklist for those activities if needed.

IRS scrutiny of foreign accounts means that you need to be absolutely clear about any non-US accounts or income so that we report it correctly.

If you have bought and/or sold a home in 2021 we need the closing statements on both purchases and sale.

Finally, in some tentative year-end planning, we are reasonably certain that Federal income tax rates will increase in 2022, so tax deductions will be more valuable next year vs. this year. If you have any control over year-end bonuses, it would be wise to call us and see if they would be better to receive them before the end of 2021, or wait until 2022.

Every year we are reminded how much we value your business, and we look forward to assisting you in the upcoming year. We trust you had a wonderful Holiday and Happy New Year. As always, we thank you for your business & referrals, and we look forward to hearing from you soon.

Sincerely,

*Jamie & Team*  
 Jamie R. Dent CPA

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