



It is tax season time again!

We truly appreciate your business and look forward to working with you this tax season.

As always, we are committed to providing quality service with a personal touch as we continue to upgrade and expand the level of service and technology required to meet your tax, accounting, and financial needs. **You may send us your tax documentation in the following ways:**

1. **Drop it off at our office:** 402 Peck Ln, Orange, CT, 06477
2. **Secure Client** <https://www.encyro.com/likethewind>
3. **Portal: Mail:** Like the Wind LLC 402 Peck Ln, Orange, CT, 06477
4. **Fax:** 203-674-9922
5. **Email:** tax@remotebooksusa.com

Upon receipt of your information, we will review your documents and then contact you with any questions we may have.

Please note the following:

Your Tax Checklist is on page 2 of this letter

We urge you to consider dropping off or sending us your tax documents so that we can process them more efficiently.

- To ensure accuracy, we will contact you by telephone or email with any questions or open items that we may have to complete your tax filings.
- Upon completion of your filings, we will get back to you with your tax return result. You will need to E-sign the form 8879 upon reviewing your tax return before we submit with the IRS.

Thank you,

Like The Wind LLC dba RemoteBooksUSA

Personal Tax Checklist

Payment for services is expected at the time of service (Cash, Check or MC/Visa)

- ___ Taxpayer/spouse/dependent children: address, phone, email, date of birth, social security numbers, tax ID numbers
- ___ New Clients, copy of previous year federal & state tax filings
- ___ Copy of your driver's license or government issued ID
- ___ Crypto/Virtual Currency (BITCOIN), in 2024 did you receive, sell, send, exchange, acquire or dispose an interest in virtual currency
- ___ Did you receive any letters from IRS related to Cryptocurrency holdings
- ___ Forms W-2, Income received from your employer
- ___ Unemployment, Did you receive unemployment in 2024, if so we need the state Dept of Labor for 1099-G
- ___ Self Employed - Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099s (ask for Business Tax Organizer)
- ___ Records of all business expenses — check registers or credit card statements, and receipts
- ___ Business-use asset information (cost, date placed in service, etc.) for depreciation
- ___ Home office information, if applicable
- ___ CT Passive Entity Tax Paid on your business entity-copy of CT K-1 showing 2024 Passive Entity Tax Paid
- ___ Did you sell your primary residence and/or buy a primary residence (include closing statement)
- ___ Rent property income - Records of income and expenses (ask for Rental Income Tax Organizer) Rental property information (cost, date placed in service, etc.) for depreciation
- ___ Record of estimated tax payments made (Form 1040-ES)
- ___ Pension/401K/IRA/SIMPLE/SEP/Annuity distribution income (1099-R)
- ___ Qualified Disaster-related Retirement Distribution - did you take a 2020 distribution
- ___ Traditional IRA basis (i.e. amounts you contributed to the IRA that were already taxed)
- ___ Social security/RRB income (1099-SSA, RRB-1099)
- ___ Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- ___ Income from sales of stock or other property (1099-B, 1099-S)
- ___ Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
- ___ Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- ___ Investment Expenses - do you have any expenses related to your investment holding (Margin Interest)
- ___ Other Income-Gambling income (W-2G or records showing income, as well as expense records), Jury duty records, Hobby income and expenses, Prizes and awards, Trusts, Royalty Income 1099-Misc, any other 1099s received
- ___ Record of alimony paid/received – if divorced before 12/31/2018, we need year of divorce and ex-spouse's name and SSN

- _____ Forms 1098 or other mortgage interest statements
- _____ Real estate tax and auto/personal property tax payment records
- _____ Receipts for energy-saving home improvements (i.e. solar panels, solar water heater)
- _____ All other 1098 series forms
- _____ Charitable Donations - Cash amounts donated to houses of worship, schools, other charitable organizations
- _____ Records of non-cash charitable donations
- _____ Amounts of miles driven for charitable or medical purposes
- _____ Medical Expenses-Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- _____ Health Insurance-Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
- _____ Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e., an employer, insurance company, or government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)
- _____ Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)
- _____ Childcare Expenses-Fees paid to a licensed day care center or family day care for care of an infant or preschooler wages paid to a babysitter (Don't include expenses paid through a flexible spending account at work)
- _____ Educational Expenses-Forms 1098-T from educational institutions, Receipts that itemize qualified educational expenses, Records of any scholarships or fellowships you received
- _____ Form 1098-E if you paid student loan interest
- _____ K-12 Educator Expenses-Receipts for classroom expenses (for educators in grades K-12)
- _____ State & Local Taxes-Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- _____ Retirement & Other Savings-Form 5498-SA showing HSA contributions, Form 5498 showing IRA contributions
- _____ All other 5498 series forms (5498-QA, 5498-ESA)
- _____ Federally Declared Disaster-City/county you lived/worked/had property in, Records to support property losses (appraisal, cleanup costs, etc.)
- _____ Records of rebuilding/repair costs, Insurance reimbursements/claims to be paid, FEMA assistance information, Check FEMA site to see if my county has been declared a federal disaster area
- _____ Income of other adults in your home
- _____ Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)
- _____ Did you receive any other letters from the IRS or States?