

CHECKLIST FOR TAX FILERS

Use this checklist to help compile your essential tax paperwork.

ORGANIZE YOUR TAX DOCUMENTS

- Compile your documents: See [Essential Tax Prep Paperwork](http://www.slissnercpa.com) at www.slissnercpa.com to know what information you need for filing.
- The tax reporting statements that you need to document income, interest and withheld taxes should arrive by the end of January.
- Investment-related 1099s typically do not arrive until February or later.

KNOW THE FILING DEADLINES

- The IRS Form 1040 (individual income tax return) is due is April 15, or if that falls on a Saturday, Sunday or holiday, the closest business date after.
- Most states, including New Jersey, follow the IRS deadline for filing.
- We can file an automatic extension (Form 4868) for taxpayers who are not ready in April, which gives you an additional six months to file.
- For business owners, the deadline for filing Forms W-2 and 1099 is January 31.



SUBMIT YOUR TAX PACKAGE

- Once you have compiled all necessary documentation, you are ready to submit your tax package.
- Drop off, mail, email or upload your documents to us.
- If you send documents electronically, we accept PDF, Word and Excel formats.
- Our team will call you with questions, then call you to review your tax returns when we have the final draft.
- If you prefer to meet in person to review your taxes, call early to schedule a tax prep appointment and send your tax package at least two weeks in advance of your meeting.

PREPARE TO MAKE YOUR TAX PAYMENTS

Generally, any tax payments owed are due when tax returns are filed. Most taxpayers opt to make payments by direct debit, check or online. Payments must include taxpayer social security number(s) and the tax year in order to be applied correctly.

CHECK ON YOUR REFUNDS

Depending on when you file electronically, you could receive your tax refund payment by check or by direct deposit within two to three weeks. If you have not received your refund four weeks or later after filing, you may check on your refund status online at www.irs.gov/refunds or www.nj.gov/treasury/taxation/checkrefundstatus.shtml or by calling the IRS at 800-829-4933 or NJ at 800-323-4400/609-826-4400.

CONTACT US FOR HELP

- Stop by, call us at 973-917-4080 or email us at info@slnjcpa.com.
- Our accountants are available by appointment seven days a week; please call in advance to schedule a meeting.
- During tax season, our office is open extended hours on both weekdays and weekends.

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