Instructions for Submitting Your 2023 Tax Information

Step 1: Tax Information Packet

Tax Information Packet includes the following:

- 2023 Tax Return Organizer
- 2023 Motor Fuel Income Tax Credit Form I-385 (each household vehicle)
- 10" x 13" Manila Envelope

Step 2: Complete Tax Information Packet

Complete sheets in black or blue ink. Submit tax documents*. If you have questions, please call at (803) 276-4246 or taxinfo@summerandcompanysc.com.

*Tax Season Tips -

- ✓ Do not staple tax documents (W-2s; 1098s; 1099s; SS statement; brokerage statements)
- √ Remove all tax documents from envelopes (Keep envelopes at home)
- √ Add up your receipts, submit Totals only. (Keep receipts at home)
- ✓ Turn in early to beat the rush!
- ✓ Include VOIDED check for direct deposit of refund. (Deposit slip not acceptable)

Step 3: Submit your Tax Information Packet

You can submit your Tax Information Packet in one of the three following ways:

- Parking Lot Drop Box (*preferred method*) (located in the parking lot adjacent to our 1508 Lindsay St office). For your convenience, use our drive thru secure metal drop box, which is available 24 hours a day, 7 days a week.
- Electronically (second preference)
 - Step by step instructions are available on youtube at https://www.youtube.com/watch?v=4aonPSUks2s
 - Step 1: Email us at taxinfo@summerandcompanysc.com with the subject "Client Portal"
 - Step 2: You will receive an email with instructions on how to access.
 - Step 3: Upload your Tax Information Packet and your tax documents (W-2s, 1098s, 1099s, Social Security statement, brokerage statements, voided check, etc.)
- **Drop off in the lobby** of our 1508 Lindsay St office in downtown Newberry.

Tax Return Organizer

New Tax Return Client? YES / NO		Moved in last 12 months? YES / NO					
Name		Date of Birth	Pate of Birth Social Security Number		Dependent of Another?		
		Date of Birti	Jocial Jec	unity Number	Del	Yes / No	1161;
						Yes / No	
						•	
Address		Email		Primary Phone			
ocuments to Bring							
Wages (Bring W2s)		Alimony Information					
Interest (Bring 1099-INT)		Estimated Tax Payments made					
Dividends (Bring 1099-DIV)				ncome and e			
Brokerage (Bring statement)		Farm income and expenses					
Unemployment (Br	ng statement)	Rental income and expenses					
Retirement income (Bring 1099-R)		Charity (totals only) From IRA					
Health Insurance (Bring 1095-A)		Mileage _		Cash _		Non-Cash	
Social Security (Bring SSA-1099 – it's pink)		Property Taxes (totals only)					
Mortgage Interest Statement (Bring 1098)		Real Estate Personal Property					
Voided Check*			cal (totals	• •			
*If not included, Tax Return Refund will be paid by check		Out of Pocket					
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