

# 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](mailto: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](mailto: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

Filing Status: Single / Joint / Head of Household / Married Separately

Date: \_\_\_\_\_

New Tax Return Client? YES / NO	Moved in last 12 months? YES / NO
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Name	Date of Birth	Social Security Number	Dependent of Another?
			Yes / No
			Yes / No

Address	Email	Primary Phone

**Documents to Bring**

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|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Wages (Bring W2s)</li> <li><input type="checkbox"/> Interest (Bring 1099-INT)</li> <li><input type="checkbox"/> Dividends (Bring 1099-DIV)</li> <li><input type="checkbox"/> Brokerage (Bring statement)</li> <li><input type="checkbox"/> Unemployment (Bring statement)</li> <li><input type="checkbox"/> Retirement income (Bring 1099-R)</li> <li><input type="checkbox"/> Health Insurance (Bring 1095-A)</li> <li><input type="checkbox"/> Social Security (Bring SSA-1099 – it's pink)</li> <li><input type="checkbox"/> Mortgage Interest Statement (Bring 1098)</li> <li><input type="checkbox"/> Voided Check*</li> <li><i>*If not included, Tax Return Refund will be paid by check</i></li> <li><input type="checkbox"/> Driver's License</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Alimony Information</li> <li><input type="checkbox"/> Estimated Tax Payments made</li> <li><input type="checkbox"/> Business income and expenses</li> <li><input type="checkbox"/> Farm income and expenses</li> <li><input type="checkbox"/> Rental income and expenses</li> <li><input type="checkbox"/> Charity (totals only) From IRA _____<br/>Mileage _____ Cash _____ Non-Cash _____</li> <li><input type="checkbox"/> Property Taxes (totals only)<br/>Real Estate _____ Personal Property _____</li> <li><input type="checkbox"/> Medical (totals only)<br/>Out of Pocket _____<br/>Mileage _____ Ins. Prem _____ LTC Prem _____</li> </ul> |
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**Dependent Information**

*PROOF OF RESIDENCY (must provide at least one): Letter from school, childcare provider receipt, doctor's invoice, DL's for dependent, DSS or SS statement*

Dependent Name	Date of Birth	Social Security Number	Proof of Residency	Daycare	Month in Home
			Y / N	Y / N	All year OR ___ mths
			Y / N	Y / N	All year OR ___ mths
			Y / N	Y / N	All year OR ___ mths
			Y / N	Y / N	All year OR ___ mths

If applicable, please enter totals below.

- Volunteer Firefighter/EMS (Yes or No)
- Student Loan Interest \_\_\_\_\_
- Educator Expenses (max \$300) \_\_\_\_\_
- College/529 account contributions \_\_\_\_\_
- IRA Contributions (specify if ROTH or TRAD and Taxpayer or Spouse)  
TRAD/ROTH \_\_\_\_\_(T/S) TRAD/ROTH \_\_\_\_\_(T/S)
- College Expenses (Bring 1098-T)
- Subsistence Pay
- Virtual Currency (Bring statement)
- Foreign Bank Account (Bring statement)

**Estimated Income Tax Payments**

	Federal	State
4/18/2023	_____	_____
6/15/2023	_____	_____
9/15/2023	_____	_____
1/16/2024	_____	_____

Notes:

**Office Use Only**

- BOI Form
- PT-100
- Other: