

Dear Friends,

I hope you this letter finds you healthy and happy in the New Year.

In general things are pretty similar to last year except for the government stimulus checks some of you received. Please include the amount of your stimulus check with your other tax information.

The attached organizer is designed to help you gather the tax information needed to prepare your 2020 personal income tax return. Please return the completed form with your other Important Tax Documents that you have been receiving in the mail. Be sure to provide any additional information to questions that you answer "yes".

As always, when ready, please drop off your information anytime thru the **mail slot in my door at 1623 US Highway 1, Suite A4, Sebastian FL 32958**, which is the same location as previous years. You can also send your information in by US Mail. Please call me if you would like to send information electronically. **Also please let me know when you have left information for me to pick up. 772-589-0240 (call, text, or voicemail) or email dan@orourkeassociates.com.**

We will also need any of the following information:

- IRS Notice 1444 Economic Impact Payment
- Forms W-2 for wages, salaries and tips.
- All forms 1099 for interest, dividends, retirement, miscellaneous income, Social Security, state or local refunds, gambling winnings, etc.
- Brokerage statements showing investment transactions for stocks, bonds, etc.
- Schedule K-1 from partnerships, S corporations, estates, and trusts.
- Statements supporting deductions for mortgage interest, property taxes, and charitable contributions
- Copies of closing statements regarding the sale or purchase of real property.
- Legal papers for adoption, divorce, or separation involving custody of your dependent children.
- Proof of address of dependent children
- Any tax notices sent to you by the IRS or other taxing authority.
- A copy of your income tax return from last year, if not prepared by this office.
- Medical receipts and/or Year end printouts from your medical, dental, pharmacy and doctors offices.

Thanks for the opportunity to serve you. Please call 772-589-0240 with any questions.

Sincerely,
Daniel O'Rourke

<https://www.irs.gov/tax-professionals/enrolled-agents/enrolled-agent-information>
Tax Practitioner Identification Number P00936909