

2024 Tax Season Procedures

REJ is dedicated to keeping clients and staff safe during the upcoming tax season. To ensure everyone's safety, REJ is implementing a CONTACTLESS tax preparation experience for the upcoming 2024 tax season.

Our preparers, Bob, Rich, Francois, Ashley, and Brenda will be processing taxes by contactless drop-off, mail, or email. You may opt for the method which is most convenient for you. Any questions will be addressed by phone.

CONTACTLESS DROP-OFF: All clients will need to follow these procedures.

1. Gather all your tax materials. You may have received an email with your checklist of last year's items if you are a current client.
2. Include a copy of your driver's license, as well as your spouse's driver's license, **if you renewed your license.** The Tax Place clients **must** include a copy of their driver's license.
3. **Fill out the enclosed tax client information sheet, sign, and include with your tax documents.**
4. Secure all your documents in a 9x12 envelope to prevent loss of any materials.
5. Place your name, phone number, email, and preparer's name on the outside of the envelope.
6. Drop your envelope into the secure drop-off box located at the front of the building.

We will call you if there are any questions and when your taxes are complete to schedule a pick-up date.

Drop off Pick-Up Procedures

1. When your taxes are complete, the office will call you and schedule an appointment for you to come in, sign, pay, and pick up your taxes.
2. You may pay your bill by cash, check or credit card. Credit card information can be taken by phone, but we prefer the actual card to scan in the office.

FOR MAIL: REJ's Accounting & Tax Service, 13740 Dix-Toledo, Southgate, MI 48195-2434

All clients will need to follow these procedures.

1. Gather all your tax material. An enclosed check list will help you with what applies to you.
2. Include a copy of your driver's license, as well as your spouse's driver's license, **if you renewed your license.**
3. **Fill out the tax client information sheet, sign, and include with tax documents.**

Mail Pick-Up Procedures

1. If you choose to have your taxes returned by mail, we will return them by priority mail at a \$15 charge to cover postage and handling. Your bill must be paid prior to mailing or filing.
2. If you choose to pick up your taxes in person, you will need to schedule an appointment when the office calls you to inform you of completion.

3. You may pay your bill by cash, check or credit card. Credit card information can be taken by phone. We are looking to reimplement pay by refund again.

FOR E-MAIL: info@rejaccounting.com

All clients will need to follow these procedures.

1. Gather all your tax material. An enclosed checklist may have been emailed earlier to you of last year's items.
2. Include a copy of your driver's license, as well as your spouse's driver's license **if you renewed.**
3. **Fill out the tax client information sheet, sign, and include with tax documents.**
4. You need to scan your information into an e-mail at info@rejaccounting.com

E-mail Pick-up Procedures

1. If you choose to pick up your taxes in person, you will need to schedule an appointment when the office calls you to inform you of completion.
2. You may pay your bill by cash, check or credit card. Credit card information can be taken by phone, but we prefer the actual card to be scanned in the office.
3. If you'd like your returns sent by E-mail, we will E-mail you an 8879-signature form which will need to be signed by the client and the spouse and returned to REJ's by E-mail before taxes can be filed. If you are an out-of-state client, we have a docu-signed option available.

Thank you for your cooperation with these procedures. Hopefully, we will be able to keep everyone safe as we conduct our business in 2025.

List of Tax Preparations items, Forms, Documents (we have emailed you a list based on your last tax return)

W2 Forms for Salaries, wages and tips

Interest Income Statements (from Banks) Form 1099-Int & 1099-OID

Dividend Income statements Form 1099-DIV

Sales of Stock, Land, etc for Capital Gains: 1099-B

Sales of Real Estate: Form 1099-S also bring in your closing statements for when you bought and sold

State tax refunds: Form 1099-G

Alimony received or Paid

Gambling wins W2-G and loss statements.

Unemployment compensation received

Miscellaneous Income Form 1099-NEC and 1099-

Misc Retirement Income Form 1099R

Social Security Income and Railroad Retirement Income Form SSA-1099

Business Income and Expenses

Rental Income and Expenses

Farm Income and Expenses

Miles traveled for Business, Charities and Medical

Deductions

Medical Expenses including medical insurance bring in 1095A for insurance bought on Marketplace

Prescription Medicine, doctor and dentist payments, hospital and co-pays

Home Mortgage Interest form 1098 and taxes paid on the house.