

## **GUIDELINES FOR MAILING IN OR DROPPING OFF TAX INFORMATION**

As a convenience to our clients, we have always allowed our existing clients to mail in or drop off tax information; however, **tax information collected during a face to face meeting which follows an orderly collection routine is by far the most efficient way for us to prepare a return.**

If you choose to mail in or drop off, please, please follow the guidelines below to help us prepare your return in the most efficient, least time consuming manner.

**1. Follow the yellow sheet. Follow the yellow sheet. Follow the yellow sheet.** Go down each item to see what applies to you to narrow down the information to what is actually necessary. The sheet not only lists the type of information needed, but also where to find it. If an expense is not listed on the yellow sheet, it is not relevant to your tax return.

2. Be sure you provide all W-2 or 1099 documents, as well as mortgage interest statements if applicable. Compare what you have to what you had the prior year to be sure you don't miss anything.

3. To best organize your itemized deductions, use the worksheet provided on the website. The worksheet gives a comprehensive listing of what may be deductible.

3. If you have a business or use a home office, use the worksheets provided on the website. Please organize your income or expenses on the worksheets.

5. If you have a rental property, use the worksheet provided on the website. It will guide you through any necessary information for reporting the rental property.

**6. Do not send receipts. Do not send receipts. Do not send receipts.** You need to keep receipts in your tax file, but we do not have the excess time to sift through receipts. All you really need to send is your various income W-2's and 1099's, your mortgage interest statements and any other government related forms. Use the worksheets to provide me with the other information.

7. Send the information to the PO Box, not the physical address.

Relevant addresses:

**Mailing Address**

PO Box 607  
Brownsburg, IN 46112

**Website address**

[www.heinekampfinc.com](http://www.heinekampfinc.com)

**Email address**

[steve@heinekampfinc.com](mailto:steve@heinekampfinc.com)

**IF YOU WOULD RATHER UPLOAD YOUR INFORMATION THROUGH OUR  
SECURE SERVER, LET US KNOW AND WE WILL SEND YOU A LINK**

## **FOR ZOOM MEETINGS**

In lieu of an in-person meeting in the age of Covid-19, we can offer you the alternative of a ZOOM meeting. If you typically mail in or drop off information, and would like to now discuss the return over a ZOOM meeting, simply get us your information as always and let us know that you would like a ZOOM meeting. We will contact you to arrange for a time. We would need your information in hand before we could have the meeting.

**For those of you who typically have in-person meetings, but would prefer a ZOOM meeting this year instead, follow these procedures.**

1. Contact us and let us know that you would prefer a ZOOM meeting. We will remove you from the in-person schedule and give you an information needed date.
2. Mail in, drop off, or upload your tax information following the instructions on the other side of this page, by the information needed date.
3. If you want to upload your information, contact us and we will send you a link to our secure server for the upload.
4. Once we receive the information, we will contact you to schedule a time to ZOOM.
5. We will need to have your information in hand before we can have the meeting.