

The enclosed checklist is not required, it's only to help jog your memory, so don't stress about it.

(A detailed personalized list is available by request.)

Personal Information Needed:

- Earned income (W-2s, 1099-Misc, 1099-NEC, Unreported Income)
- Interest/Dividend/Stock Trades (1099-INT, -DIV, -B)
- 1098 from mortgage company for interest/property tax on your home.
- Sch A deductions (Property Tax, Home Interest, Charity, Medical) if more than \$13,850 single/ \$27,700 married
- Major Purchases (New Home, Vehicle)

Small Business Information Needed:

- 1099's received from employers.
- Copy of W-2s or 1099s you sent out to your employees or contract laborers.
- Your calculations of total income.
- Your business expenses – broken out the same as last year (or call for guidance).
- These can be provided as paper logs, Excel worksheets, or a Quickbooks file.

CORPORATE AND PARTNERSHIP RETURNS ARE DUE MARCH 15TH!!

TAX RETURNS ARE DUE 4/15/2024

You can call to make an appointment,
mail in your information,
or upload to the portal.

ESTIMATED PREPARATION TIME

(If provided by, dependent on volume)

February – 30-50 days
March Week 1 – 60+ days
March Week 2 – 70+ days
March Weeks 3/4 – 90-100 days
April – 90-100 days
May – 60-70 days

**We will always call you to discuss
your tax return before we finish it
and we will always supply you a form
for your signature and a copy for
your file.**

We don't open your envelope until it
comes up in the rotation. If there is an
urgent message enclosed, call and let us
know to open it when we receive it.

Anything received after Feb 27th will
probably be extended.

Call (512-259-4404) if you need an
extension, there is no charge for this
service.

BRATTON FAMILY TAX AND BOOKKEEPING SERVICES INC

**Chris Bratton, EA
Barbara Bratton, CPA
Hailey Landry, Office Mgr**

Mailing Address

**PO BOX 2242
Leander, TX 78646**

Office: (512)259-4404
Fax: (815)301-2955

brattonbiz@gmail.com

PHYSICAL ADDRESS*:

**2629 Palmera Ridge Blvd
Bldg 1 Ste 101
Leander, TX 78641**

***Not Able to Receive Mail Here
Payment is due upon completion.**

CHANGES FOR 2024

- Did you buy any Energy Star Appliances?
- Did you make any Energy Star upgrades to your home?
- Did you buy an electric or hybrid vehicle?

GENERAL REMINDERS

- Expenses are still allowed on Sch C Self Employment and Sch E rental properties.
- If you feel your deductions will be more than \$13,850 (\$27,700 Married) then send:
 - a. Home Mortgage 1098
 - b. Medical Out-Of-Pocket Costs.
 - c. Sales Tax from Vehicle Purchase.
 - d. Charitable Contributions.
- Education Credit - If your child is in college, we need Form 1098-T to calculate the college credit.
- We need your Driver's License information if you renewed it in 2023.

As a reminder, you can no longer claim any expenses against W-2 income (i.e. mileage, home office, supplies, etc). These expenses are still allowed with 1099 income.

BASIC RATES 2024

INDIVIDUALS:

Basic Federal Return	\$400
(Includes Audit Insurance and Postage)	
State returns	\$200 base
Amended return (originated here)	\$100 base
Amended return (from outside)	\$300 base
Add'l Schedules	
Complex (C,D,E,F)	\$100 base
Other Forms	\$25 base
Simple Return (W-2 only)	\$200

We will do your minor child's return for free in order to coordinate them with your return.

BUSINESS:

Form 1065 Partnerships & LLC	\$1000 base
(Includes Audit Insurance and Postage)	
Form 1120 & 1120S Corp	\$1000 base
(Includes Audit Insurance and Postage)	
Form 990 Non-Profit	\$1000 base
990-N (postcard)	\$100
Franchise Tax Report	\$50

We reserve the right to adjust these prices up or down based on complexity.

OTHER CHARGES:

In office appointment	\$50
Bookkeeping	\$100/hour
Payroll Processing	\$100/hour
Payroll Reports (Monthly Payor)	\$50/quarter
Payroll Reports (Sch B Payor)	\$75/quarter

Other tax issue resolution services (Audit, Offer in Compromise, Penalty Abatement, Etc.) offered by quote.

CRYPTOCURRENCY

As a reminder, we need to know if you had *any* activity with digital assets, and any sales or trades are probably taxable. Whatever program you are using should provide you with a report, but you may have to download it.

PORTAL UPGRADE

You can use either Drake Portals:

<https://brattonfamilytax.securefilepro.com>

Or TaxDome

<https://brattonfamilytaxinc.taxdome.com>

to send us your information electronically.

DO NOT EMAIL PERSONAL INFORMATION

REPORTING

HEALTH INSURANCE

If you received Health Insurance through the Marketplace, your 1095-A is still required to file your return.

Other than that, it is no longer required.