



CSL Tax Advisors

Serving Individuals & Small Businesses

Checklist & Questionnaire

Please use the enclosed checklist and new questionnaire to facilitate accurate return preparation and to designate a primary contact person and preferred method of contact.

Avoid Penalties, Pay Estimated Tax

Make quarterly installments to prevent under-withholding penalties. You may incur these penalties if you owe the IRS over \$1000 or owe Missouri over \$500.

Create an IRS Account

Go to [IRS.gov/account](https://www.irs.gov/account) to create a personal account. The verification process is easy to complete.

Find information on Child Tax credit, Stimulus Payments, Tax Balances, Transcripts, Payment History, Payment plan details, and get an IRS PIN, and more.

Gift Reporting

Let us know if you made or plan to make a large cash gift of over \$15,000. We will file the required information reporting forms.

Avoid Refund Delays

Federal return processing will be delayed if your figures do not exactly match the IRS records for:

- **3rd Economic Stimulus** - The maximum payment was \$1400 per person on your tax return.
- **Advance Child Tax Credit** – These payments were made from July 2021 to December 2021 to clients with qualifying children.

Medicare Benefits start at age 65

If you decide to delay your Social Security benefits until after age 65, you should still apply for Medicare benefits within three months of your 65th birthday. If you wait longer, your Medicare medical insurance (Part B) and prescription drug coverage (Part D) may cost you more money.

Meet Our Staff

- Craig Lovasz – Owner
- Kathryn Dyer – Senior Preparer
- Brian Webb – Preparer
- Betty Spicer – Front Desk
- Laure Smith – Reviewer
- Rebecca Dyer – Front Desk/Preparer



CSL Tax Advisors

Serving Individuals & Small Businesses

Notary Services Available

Free notary services for clients and low fees for non-clients.

Paying for Private School?

Ask us about §529 Educational Saving Plans as way to save on Missouri taxes if you are paying qualified tuition expenses for K-12.

Form 1099-K

Reporting rules have changed. Please bring in Form 1099-K if you receive one.

Secure File Pro Portal

Send us documents & PDF photos through our Secure Online Portal. You may choose to set up an account or use the Guest Exchange.

Easy Payment of Prep Fees

Let us know if you would like us to use your bank account to pay the tax preparation fees.

IRA Contributions

No more age restrictions to make contributions to traditional IRAs. The contribution limit for 2021 is \$6,000 (\$7,000 if over age 50).

Need FAFSA Forms?

Let us know if you need FAFSA forms for your college students. We can provide helpful information for you.

NEW! Convenient Scheduling

Go online www.csntax.com to schedule a phone call or in-person appointment. Appointments are not needed for drop offs.

Let us Adjust your W-4

We can adjust your W-4 withholding so you can get the refund you want.

**All Tax Payments Are Due
April 18, 2022**

HSA Contribution Limits

Contribution limits for Healthcare Savings Accounts in 2022 are \$3650 for individuals or \$7300 for families.

Missouri Gas Tax Rebate

Missouri is offering a refund of the new gas tax increase. to Missouri residents. This is not part of your MO income tax return.