GETTING STARTED

K & K Tax Service has grown over the years in order to provide you more comprehensive tax services to meet your individual, business, and e-file needs. We will continue to strive to not only meet, but exceed your expectations. You now have several convenient choices to complete and file your taxes. Choose the method that applies to your current situation. Filing taxes has never been easier. By using K & K you can arrive at your smallest tax liability, or largest refund in the fastest possible time. You can be confident that real people are available to you and are on your side to give you the best results every time. Our years of expertise can be found in every step of the process. We'll help you explore deductions and experience scenarios that may lead to additional tax savings. The information below will help you decide the best method for you.

Use our online system if these conditions apply to you:

- You make under $30,000 a year
- You have 0-3 deductions

You should use our consultant services if these conditions apply to you:

- You have a lack of time
- You need a professional opinion
- You have a sudden change in your lifestyle
- You have a small or home based business
- You did not file last year
- You have been audited before
- You owed taxes for the last 2+ years

Things to Bring to Your Appointment

- All copies of W-2, 1099 and K-1 Forms
- All 2007 home purchase or sale settlement statements including real estate refinancing during the year
- 2007 mortgage interest and escrow statements. Medical premium, co-pays, paid medical bills, medical parking, dental, vision, car tag, prescriptions, mileage to/from doctor visit, charity contributions
- Form 1099s from brokers reporting all 2007 Stock, Bonds and Mutual Fund Sales. Determine the date and purchase price of securities sold. Bring Form 1099 for all interest and dividends you earned

- Unemployment compensation, State tax refunds, and Social Security Benefits
- W-G forms' reporting all gambling's winnings
- Forms 1099s for all Retirement Fund transfers (IRA's, transfers, withdrawals and rollovers including ROTH accounts)
- Date of birth and Social Security number of all dependents
- 2006 and 2007 Tax Returns (new clients only)
- Your list or summary of Business or Rental income and expenses if applicable
- Date and amount of each estimated tax payment you made
- Name, address, and social security number of all children care providers you paid along with the amounts paid
- Tax correspondence from the IRS or state government that you have received
- Stock option documents from your employer
- Education expenses including student loan data with interest paid, college tuition and book costs, scholarships received
- Any moving expenses cost (airline tickets, lodging, meals and job expenses)
- Any other documents you think that I may need