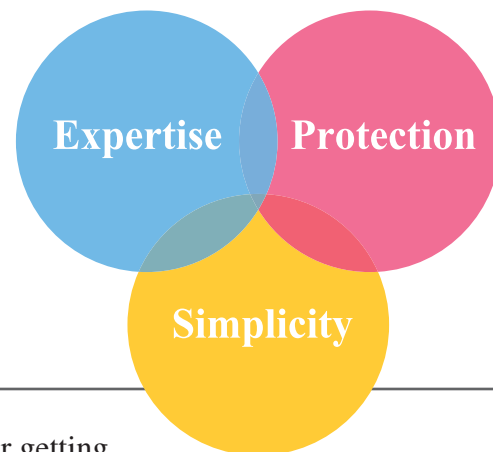


Brian C. Greenberg & Associates

Certified Public Accountants

Financial Peace of Mind

Let Us Help You Achieve It!



Happy New Year! At Brian Greenberg & Associates we are in full gear getting ready for our Super Bowl. No, not the one with all the commercials. **OUR Super Bowl – Tax Time!**

This is what we have been preparing for – our opportunity to remove the burden of tax stress from your life and provide you with a seamless, easy process for getting your taxes done with expertise and simplicity.

Just follow our simple 3-step process to get your taxes completed quickly and stress-free:

Step 1 – Make your appointment

Just reach out to Erica (erica@greenbergcpa.com or 856-596-7800) to set up your 1hr. appointment.

Times are filling up quickly, so don't wait!

Step 2 – Gather your documents

Use this quick checklist to gather the right documents to bring to your appointment:

Work

- W-2s from all your employers

Investments

- Statements of income earned from banks, brokerages, and mutual funds (all your 1099s)
- December 31st statements of holdings from banks, brokerages, and mutual funds

House

- Statement of interest and property taxes paid from mortgage company(ies) (Form 1098)
- If you rent, the total amount paid in 2011 was _____

Family

- Any changes in household (spouse, new children, children leaving the house).
Please bring SS#s and dates of birth for new additions!
- Total amount of child care paid in 2011 was _____
- Statement from Child Care Providers, containing their Federal Tax ID # and address.

Refund Information

- Where do you want your refund deposited? Please bring voided check.



www.greenbergcpa.com

Brian C. Greenberg and Associates

1 Eves Drive, Suite 111 • Marlton, NJ 08053-3125

brian@greenbergcpa.com • 856-596-7800 • Fax: 732-284-4254

Social Security/Unemployment/Retirement Distributions

- Bring all 1099's

Charity

- Total amount of Cash and/or Goodwill donated in 2011 was _____

Healthcare

- Total amount paid for Medical, Dental, Prescriptions, Copays, Premiums was _____

Business Owners and Landlords (Rental Properties)

- Summary of business miles driven _____
- Total amount of rental income was _____

Employee Expenses

- Business miles driven _____
- Cell phone _____
- Computer (if bought) _____
- Tolls _____
- Meals _____
- Entertainment _____

Insurance

- Most recent Life Insurance Statement

Step 3 – Come to your appointment

It's that easy! Follow these three simple steps and then get back to doing whatever you do that DOESN'T stress you out! Can't wait to see you at your appointment!

Best wishes,



Brian C. Greenberg, CPA

** Bring all the above documents and information that apply to you to your appointment and we will discount your tax preparation by 5%! If you have a question as to whether items apply to you or are unclear on what you should bring, just drop us an email (renee@greenbergcpa.com) or give us a call (856-596-7800).*

www.greenbergcpa.com

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brian@greenbergcpa.com • 856-596-7800 • 732-284-4254