Our Triple Guarantee

Accuracy

Thorough employee training and double-checking of every return safeguards the accuracy of your return. However, if we make an error we will correct our error and reimburse you for any penalties and actual interest damages you incur. You will still be responsible for any additional taxes that would have been due had the error not been made.

Assistance

We are available all year-round to answer any tax questions you may have. Should your return be audited, we will help you prepare for the audit and serve as your advisor (not your legal representative) throughout the audit process. (If you should require or request that we represent you, we will be glad to do so for an additional charge.

Satisfaction

If you are not pleased with the service you receive in the preparation of your tax return(s) and you choose to neither file them nor allow us to redo them, we will refund your fee in full.

5 convenient locations!

North of the James River:

Corporate Office - The Forum Office Park

Near Innsbrook, just west of Gaskins Road,

10120 W. Broad St., Suite C.

804.282.1040

Richmond Business Center

1518 Willow Lawn Drive, Suite 308,

By appointment only

804.612.7538

South of the James River:

Huguenot Place

Near Chesterfield Towne Center,

1520 Huguenot Rd., Suite 111

804.794.8729

Commonwealth Centre

Across from Brandermill,

4521 Commonwealth Centre Parkway

804.763.0667

Meadowbrook Plaza

Chippenham Parkway & Hopkins Rd.,

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- **Half-price tax returns for dependents**
- **The Income Tax School Comprehensive Tax Course tuition-free (small fee for books)**
- **Senior 10% discount**

Tax Document Checklist

What Do I Need To Bring To My Appointment?

- Your Tax Return from Last Year
- Your Social Security Card
- Your Dependent(s) Social Security #'s
- Your Driver's License or Picture ID
- Wage Statements - W-2's
- Pension & Retirement Income & 1099s
- Interest & Dividend Income
- Commissions & 1099s
- Self-Employed Business Income
- Self-Employed Business Expenses
- Lottery/Gambling Winnings
- State Refund Amount
- Social Security Income
- Unemployment Income
- Rental Property Income
- Alimony Paid/Received
- Purchase/Sale of Residence Records
- Medical & Dental Expenses
- Taxes Paid (real estate & personal property)
- Charitable Donations
- IRA Contributions
- Interest Paid
- Work Related Expenses
- Educational Expenses for Taxpayer
- Educational Expenses for Dependents
- Child Care Expenses & Documentation
- Investment Income/Expenses
- Healthcare Information for yourself and dependents
- _____
- _____
- _____

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