KE ACCOUNTING & TAX SERVICES LLC

Frequently Asked Questions (FAQs)

1. **What are your fees?**

   Our fees vary depending on what services you need, the size of your business, and whether you need expedited assistance.

   - Tax preparation and/or tax planning estimates - contact Marilyn at (984) 237-0044, extension 104
   - Business consulting, accounting, and/or payroll service estimates - contact Kelligrace at (984) 237-0044, extension 103

2. **How do I make an appointment with Kelligrace?**

   You have two options: (1) You can schedule an appointment on your own by going to our website and clicking the red "SCHEDULE APPOINTMENT" button (2) call the office at (984) 237-0044, extension 103 to leave a voicemail or schedule a meeting.

3. **How do I make an appointment with Marilyn, Amanda, or Doris?**

   - Give Marilyn a call at (984) 237-0044, extension 104
   - Give Amanda a call at (984) 237-0044, extension 105
   - Give Doris a call at (984) 237-0044, extension 106

4. **When will I get my refund?**

   Federal
   You can check the status of your federal income tax refund via the IRS Refunds webpage. Information is updated once a day, overnight. You will need to following information to check your refund status online:

   - Your Social Security or taxpayer ID number
   - Your filing status
   - The exact refund amount on your return

   If you are using a mobile device, you can check your refund on the IRS2Go app. For more information, read about Where's my Refund? or check out Tax Season Refund Frequently Asked Questions.

State

You can check the status of your refund online by using our Where's My Refund? web service. In order to view status information, you will be prompted to enter the social security number listed on your tax return along with the exact amount of your refund shown on line 34 of Form D-400, Individual Income Tax Return.

For more information, check out the North Carolina Department of Revenue's web pages about Tax Season 2023, Understanding the Refund Process, and FAQs.

5. **What documents do I need to file my taxes?**

Documentation	Forms
Basic Information	Full name and date of birth for yourself, spouse, and dependents
Banking	Please provide a voided check if filing electronically
Tax Returns	Copy of tax return from the previous year
Social Security Documents	• Social Security cards for all people included on your tax return • For electronic filing, we need a government-issued ID that includes a photograph (i.e. driver's license, passport, or state identification card)
Income Statements	• W-2s, one from each employer for all jobs • W-2c, only if your employer made a mistake on your W-2 • MISC-1099s • W-2G, certain types of gambling winnings • 1099-R, received distributions from a pension, annuity, IRA, insurance contract and other retirement accounts • Alimony received *BEFOR*E 2019
Other Income Tax Forms	• Schedule K-1 for trusts, partnership and S corporations • Form 1099 and Form 1099-MISC, self-employment income • Form 1099-A, foreclosure of a home • Form 1099-B, proceeds from broker transactions • Form 1099-C, cancellation of debt • Form 1099-DIV, dividends and distributions • Form 1099-G, unemployment income or a state tax refund • Form 1099-INT or Form 1099-OID, interest income • Form 1099-K, business/rental income processed by 3rd party networks • Form 1099-LTC, Long Term Care reimbursements • Form 1099-PATR, patronage dividends • Form 1099-Q, payments from qualified education programs

	● Form 1099-QA, distributions from an ABLE account ● Form 1099-S, proceeds from the sales of property ● Form 1099-SA, Health Savings Account and Medical Savings Account distributions ● Form SSA-1099, Social Security benefits ● Form RRB-1099, railroad retirement benefits
Tax Deduction Records	● Form 1098, Mortgage Interest Statement ● Form 1098-C, donation of an automobile, boat or aircraft worth more than $500 to a tax-exempt organization ● Form 1098-E, interest you paid on a student loan during the preceding year ● Form 1098-T, post-secondary education Tuition Statement ● Form 1040ES copies, record of estimated tax payments made ● Alimony paid *BEFORE* 2019 (will need recipient Social Security Number) ● Moving expenses ● Real estate taxes
Expense Receipts	● Medical expenses (healthcare, prescriptions, doctors, dentists, eyeglasses, medical insurance, long term care insurance) ● Charitable contributions ● IRA contributions ● Business expenses (receipts, invoices, and mileage logs) ● Children and/or dependent expenses (childcare, tuition, before/after school care, adoption expenses, etc.) ● Form 1095-A, ACA Health insurance

6. What do I need to do *BEFORE* my appointment?

Please complete our Tax Return Questionnaire ahead of your appointment. The questionnaire answers our basic question and gives you a good idea of the documentation that we will need to provide you with excellent customer service.