

Let Ward's Tax Service<sup>SM</sup>  
handle your tax preparation  
needs!

Ward's Tax Service, LLC is  
family owned and operated  
and has served Fort Mill and  
the surrounding areas since  
1964!

Located in downtown Fort  
Mill, it is conveniently  
located to both Rock Hill  
and Charlotte.

David Ward started the business in  
1964 with his wife Peggy. 33 years  
later, their daughter Carma joined  
the business and approximately 15  
years ago, their granddaughter  
Brandi joined the business as  
well. Before David passed away, he  
left the business to his daughter and  
granddaughter and they are still  
keeping the family feel that this  
company was founded on. We are  
sure to meet your tax preparation  
needs and answer any questions you  
may have so come see us today!

*We have a Certified Public  
Accountant (CPA) on staff!*

## SERVICES OFFERED

### Individuals

- Individual Income Tax returns
- Electronic Filing
- Direct Deposits

### Small Businesses

- Small Business Tax Returns (Sole Proprietorships)
- 1099 Preparation

*The following tax services are not provided:*

*Rental home house SALES  
Short-term rentals (AirBNB / VRBO)  
Returns containing any sort of K1  
New York tax returns*



Ward's Tax Service, LLC  
207 Forrest Street  
Fort Mill, SC 29715

In order for us to execute our services, please see the following list for documents to bring with you.

*Items Needed for All Clients*

- **Driver's License Info for Taxpayer & Spouse**  
**(State, Number, Issue Date, Expiration Date)**
- W-2
- Interest income from checking or savings account(s)
- Dividend income
- State & local income tax refunds *(Form 1099-G)*
- Alimony received
- Hobby income & expenses
- Misc income *(Form 1099)*
- Retirement income *(Form 1099-R)*
- Unemployment compensation *(Form 1099-G)*
- Social Security benefits
- RR1 benefits
- Gambling & lottery winnings
- Partnership Income *(Schedule K-1)*
- Misc income
- State and local income taxes you paid last year  
*(from last year's tax return)*
- Educator Expenses
- Penalties paid for early withdrawal of savings / CD  
account(s)
- Alimony paid *(don't forget to obtain SSN)*
- IRA contributions or contributions made to other  
retirement plans
- Student loan interest paid
- Tuition information *(Form 1098-T: this can be  
downloaded from the student's online account) &  
book receipts*
- Child care expenses
- Adoption expenses

*Additional Items*

- Itemized & misc deductions *\*please note, any medical  
insurance premiums cannot be included if they are paid with  
pre-tax dollars*
- Small business income & expenses
- Rental income & expenses
- Office In Home expenses
- Ministry expenses
- Information for all Stocks sold during the year *(purchase price,  
date purchased, number of shares purchased, date sold, sale  
price, etc.)*

*Additional Items Needed for NEW Clients*

- All of the above items
- Your last income tax return
- The amount you paid to prepare your last tax return

\*\*Don't forget to bring the SSN and birthdates of your dependents!\*\*