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Dear Client,

Please take a moment to read the following letter.

The 2019 Tax Season is here. We are now scheduling appointments to prepare your 2018 tax returns. The IRS has notified us that your 2018 individual 1040 Tax Return can be e-filed starting January 28, 2019. Now is the time to start putting your information together and give us a call to schedule your appointment.

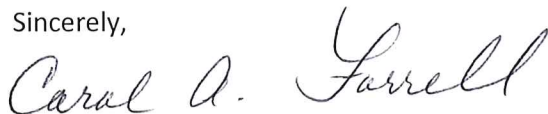
Please note the following:

- **Payment is expected when you come to sign your return. No returns will be filed until they are paid for, no exceptions.**
- If you need a **FASFA form** or are **refinancing your home** please let us know when you make your appointment.
- There will be **no Friday or Sunday appointments.**
- If you are more than 15 minutes late for your appointment, you may need to reschedule.
- Please come prepared with **all the information needed to prepare your return.** Anyone missing information will not be worked on until everything is submitted to the office.
- Returns will be prepared on a **first come first served** basis.
- If you do not need to consult with me you may drop off or mail your information anytime.
- **If you request additional copies of tax returns or any other documents that we have already supplied to you there will be a fee of \$25.00 paid prior to the release of the copies.**

We request that you bring in your information by March 27th, 2019. Any returns brought after that date are not guaranteed to be completed by April 15, 2019. If you bring your information **after March 27th, 2019 and must have it filled out by April 15th there will be an additional charge of \$150.00.** If an extension of time needs to be filed for your 2018 return there will be a **\$50.00 fee for personal and \$75.00 fee for corporate extensions.** Please contact the office and let us know an extension needs to be filed. **We are no longer automatically filing extensions for people.**

We are looking forward to meeting with you and preparing your 2018 Tax Return. If you have any questions concerning what you need to bring after reviewing the enclosed checklist please ask us at the time you make your appointment. **We prefer email for any tax questions as it gives us time to do any necessary research related to your question before we respond.** Please remember that your appointment is your time to ask questions please try to avoid calling the office to ask questions that may be answered during your appointment.

Sincerely,



Carol Forrell

Carol A. Forrell CPA

TAX RETURN CHECKLIST

Client Name: _____ Year: _____

INCOME

- Check name and address to make sure we have them correct.
- Dependents, child born in 2018 parent or a relative new for this year. Need DOB and SS#
- W-2's
- 1099 INT
- 1099 DIV – DIVIDENDS
- 1099R – Pensions
- K-1's
- 1099-B (Sale of Stocks) Include brokerage statement showing basis
- 1099-C Cancellation of Debt
- 1099 Misc.
- Social Security Statements
- Unemployment Statements
- Alimony received or paid
- Rental Income (List Expenses)
- Sale of Primary Residence, Include Settlement Sheet
- Gambling Winnings
- 1095-A Marketplace Statement

DEDUCTIONS

- Medical Expenses, mileage
- Health Insurance
- Long-Term Care Premiums
- Property Taxes
- Mortgage Interest
- Remortgage Primary Residence, need settlement sheet
- Contributions, Cash and Noncash

Client Name: _____

Year: _____

DEDUCTIONS (CONT'D.)

- Union Dues
- Unreimbursed Employee Business Expenses (Armed Forces Reservist, Qualified performing artist, Fee-based government official, impairment-related work expenses)

OTHER

- Daycare Expenses
- IRA Contributions
- Moving Expenses (for members of Armed Forces)
- Casualty Loss
- 1098-T, Tuition Statement, book and supply expenses
- Health Savings Account
- Student Loan Interest
- Residential Energy Credits, improvements to home, energy-efficient

Business Tax Returns - Checklist

Individuals who own a business must provide the following information in order to prepare the Schedule C, Corporate 1120, 1120S, or 1065 Returns.

_____ If records are recorded in QuickBooks include a **Backup** Copy of your company file.

_____ If records are not in QuickBooks please include a spreadsheet or a list of income and expenses.

_____ Business Checking Account Statements for the Tax Year.

_____ List of Equipment Purchased with date of purchase and amount.

_____ If equipment was traded, amount of trade-in and identify equipment traded.

_____ If new equipment purchased is registered with PA and titled include a copy of the sales agreement.

_____ List of equipment sold with date of sale and price received.

_____ Year end Credit Card statements for the business.

_____ Any loans at year end list balance at year end and interest paid for the year.

_____ List any changes to your business which you think might have a tax consequence.

_____ If you use your home as your office we will need the following information:

- Square Footage of your home and square footage of the area used for business
- Utility bills
- Sewer and Trash bills
- Major repairs – i.e., roofs, furnace repairs, septic repairs, plumbing