The Tax Professional

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****PLEASE READ & RETAIN FOR YOUR REFERENCE****

NEW FOR TAX YEAR 2016

Dear Friends,

Happy New Year! *Health Tax Laws are in full effect for 2017 so be sure to fill out ORG3A and send in all 1095 forms!* Keep this letter for your information after you return the Organizer to me. Please make sure you have done the following before sending your tax documents in:

- □ **SIGN** and **DATE** the **FRONT PAGE** of the organizer and return *the **ENTIRE** **Completed Organizer*** to me. (I do mean entire!) (One signature by a couple filing jointly is sufficient)
- □ Please indicate by which mail method you prefer to have the taxes returned to you. *Please **do not** send taxes "signature required for delivery" as that will increase processing time by an additional week.* In order to receive the ***Early Bird Discount** of 10%, Organizers must be postmarked by **February 15, 2017***.
- □ **Please be sure to fill out the required Identity Verification page included with the Organizer this year because your return cannot be filed without that information**.
- □ Please **remember** to put **your return address** on the envelope when sending your tax information to me. If you use the self-addressed envelope I have enclosed, you must put **Priority postage** on it. If your package comes "postage due", the postage amount plus a handling fee will be added to your bill.
- □ On the page labeled "page 1"in the organizer, be sure that ALL contact information is up to date, i.e. phone #'s and email. The **Number of Months** you supported your children ***must*** be answered! If you are **NOT claiming them**, please **cross them off**.
- □ Be sure to answer all **Yes/No questions** on the page labeled "page 4" of the Organizer.
- □ The New Health Insurance organizer page ORG-3A MUST be completed!
- □ Have you included a **voided check** if you want Direct Deposit**?** Internal Revenue Service guidelines mandate **a new check** each year. We *cannot* use the one provided the previous year or the information noted in your organizer.
- □ For your convenience, you may make address and/or phone number changes or request an extension by accessing our web site at: **www.thetaxprofessional.net.**

In order to receive your tax returns by April 15, 2017, ALL information must be in our hands by March 10, 2017. If we are unable to meet this deadline you will receive a 10% discount.

- **ELECTRONIC FILING** and **DIRECT DEPOSIT** are **NOT** the same thing. I do not charge for these. Electronic filing **(which is mandatory starting with tax year 2016)** is when I send your tax return electronically to the IRS. If for some reason your return cannot be filed electronically, I must prepare an additional form indicating the reason for not filing electronically. Direct Deposit is when the IRS sends your refund directly to your account. If you choose to have Direct Deposit, you **MUST** include a **voided check**. Internal Revenue Service guidelines mandate a **NEW voided check EACH year**. We *cannot* use the one provided the previous year or the information noted in your organizer.

Please see reverse for additional information

- **Child Care** is only allowed for children **12 years** and under. Even if you paid for day care with pre-taxed dollars (Box 10 on W-2), we must have the day care providers information and amount paid to them.

- **CASH** and **NON-CASH CONTRIBUTIONS** may now be recorded on the green sheets included in your tax packet for your convenience. You can make a copy of the green sheet and use it for the current year. You MUST furnish me with your receipts, cancelled checks, or credit card statements per IRS requirements.

- **MILEAGE**:
  - 2016 mileage rates: Business is **54¢**
  - Charitable is **14¢,** Medical & Moving is **19¢**
  - Year, Make and Beginning and Ending mileage for each vehicle(s) **MUST** be provided.
  - **Business** mileage, **Total** mileage and **Date Placed in Service** must be provided for each vehicle.

- The maximum contribution for both traditional and Roth **IRAs** are the lesser of Earned Income or:
  - **$5,500** for under 50 years of age - **$6,500** for those age 50 or older
  - Roth IRAs have an income limit
  - You have until April 15, 2017 to make your contribution.

- **EXTENSIONS**: 2016 tax returns are due April 15, 2017. If additional time is needed, IRS Form 4868 (Automatic Six-month Extension) **will ONLY be filed on your behalf IF you contact us or we already have your paperwork** in the office. No automatic extension can be filed without some 2016 information and your authorization to file it on your behalf. An extension request can be found on my website – **www.thetaxprofessional.net**

  An extension gives you until October 15, 2017 to file your taxes. In order for me to get them back to you by the deadline date, I must have ***all your tax information*** in my office by **September 15, 2017**.

- **Please Note**: When sending in receipts as backup documentation please total **each category** (i.e. medical expenses, Schedule C expenses, etc.) and write the totals in the organizer or on the Pink Sheet. If using the Pink Sheet for Daycare, the Organizer profit and loss pages do not have to be filled in. If receipts are sent in without being totaled by categories there will be a $125 per hour bookkeeping charge applied to your bill.

- When sending in investment statements or documents we need **ALL** of the pages.

Once you have received your taxes, you must SIGN, DATE AND RETURN ALL (federal and state) E-File Authorization Forms before your taxes can be electronically filed. Your federal and state returns must be transmitted at the same time. Even if you owe it is better to file and pay later as the Failure-to-File Penalty is much worse than the Failure-to-Pay Penalty!

Friendly Reminder: ☺ The Fee Statement will be enclosed with your taxes. Please remit payment in full to **"The Tax Professional"** within **ten (10)** days of receipt. Return a copy of the bill with your payment. Do not detach the bottom of the bill.

Sincerely,
Martha Yungk, E.A.