

Hi All,

Please be sure to fill out the enclosed organizer to the best of your ability. If you have any questions, don't hesitate to call or email me @ ([maktax@gmail.com](mailto:maktax@gmail.com)). It is important that I have the proper information to file your return. Please provide me with your email address. If I need to get in touch with you, it is the easiest way for me to do so. I often work late into the night, (or early morning) and with an email address, I can send you a message at any time.

Many of you order an expense statement from Flightline. These statements provide your yearly flying, something that is important in the event of an audit. These statements can be directly emailed to me either by you or Flightline. If you choose to use the calendar provided, it is important that you have a record of your trips...either a calendar, or print out your monthly MAPs, or your yearly leg segment. This can be found under schedule, preferences, schedule leg data extraction. There are other per diem companies out there, but some require more input from you. One of the most examined items is business expenses, as well as charitable deductions. I can not impress upon you the importance of having either your schedule or an expense report. It is very difficult and time consuming to retrieve this information a couple of years down the road, in the event the IRS requests documentation for your expenses.

If you get a notice from any tax authority, (IRS, State Tax Dept), PLEASE immediately call me and send me a copy of notice. I can't help you if I don't know about it. Remember, I can deal with taxing authorities for you!

Disclosure regulations require that I have written authorization from you before releasing ANY tax information. Please DO NOT CALL asking for a copy of tax return to be sent to a third party. Unless I have signed release provided by you, I CANNOT do it. The fine to me is extremely high. If you have dependents, and I have their date of birth, social security numbers, it will not be necessary to fill out all the info again. Just put their first name in the dependent info section of the organizer.

However, recent changes to IRS regulations require I have copies of birth certificates and social security cards. I will shred this info once it has been scanned into my secure documents file.

Please be aware that if you have a foreign bank account, this MUST be declared. If the balance in this account is more than \$10,000, you must fill out an electronic US Treasury form by April 15<sup>th</sup>. (A change from previous years). Banking regulations require banks to disclose US owned foreign accounts to the US Government. There are severe penalties for non-compliance! Please provide info to me so I can include form on tax return.

This year I plan on being in my Brooklyn office only 2 days a week. So, please send all tax packages to my Queens Address which is:

P.O.Box 40325

Glen Oaks, NY 11004-0325

FedEx and UPS will not deliver to a PO Box. Those items should be sent to:

80-07 221<sup>st</sup> St

Hollis Hills, NY 11427 (sometimes Queens Village comes up as city...or Jamaica can come up too....this is ok).

Because of a government holiday, the last day to file tax returns is April 18<sup>th</sup>. However, any package received (not postmarked!) after April 8<sup>th</sup> will have an extension automatically filed. If you want me to file an extension for you before I get your package, I will need a copy of your W2 to do so. You can scan it and email, fax it or mail it to me.

If you live in NY, it is now necessary for me to have a copy of your NYS driver's license or State ID card.

If you live in MA, please be sure to include your health insurance form, as well as rent paid.

PLEASE make sure you SIGN the engagement letter!!!! My insurance company REQUIRES it!

I look forward to hearing from you!

Mary Ann